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THESIS

**456 HOURS TO TRAIN THE RESERVE COMPONENT:
ANALYSIS OF THE IMPACT OF INCREASED ANNUAL
TRAINING REQUIREMENTS ON 4TH ASSAULT
AMPHIBIAN BATTALION**

by

Kyle J. Andrews

December 2016

Thesis Advisor:
Second Reader:

Spencer Brien
Lisa Lindsey

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IMPACT OF INCREASED ANNUAL TRAINING REQUIREMENTS ON 4TH
ASSAULT AMPHIBIAN BATTALION**

Kyle J. Andrews
Major, United States Marine Corps
B.S., Heidelberg College, 2003

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Approved by: Spencer Brien
 Thesis Advisor

Lisa Lindsey
Second Reader

Chad Seagren, Academic Associate
Graduate School of Business and Public Policy

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ABSTRACT

The objective of this research is to analyze the impact of increased annual training requirements on the reserve component, specifically, the 4th Assault Amphibian Battalion. Time is a persistent constraint that the reserve force contends with to accomplish annual general military training requirements and mission essential tasks. Currently, there are 18 annual general military training requirements the reserve component must accomplish. Previous studies have attempted to reduce and combine annual training requirements to give time back to the commander. This research will not identify ways to reduce requirements; rather, it will identify ways that the reserve component can more efficiently and effectively accomplish annual training requirements based on feedback from Marines assigned to 4th Assault Amphibian Battalion.

The study analyzes methods 4th Assault Amphibian Battalion uses to accomplish annual training requirements. Command chronology analysis and interviews provide exploratory insight to the unit's annual training model. Using command chronology data and interview transcripts, we develop a training model that can be used to improve training effectiveness and efficiency. We believe that adjusting how reserve units conduct 11 of the 18 annual general military training tasks will provide commanders additional time to focus on mission-essential task training.

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TABLE OF CONTENTS

I.	INTRODUCTION.....	1
A.	OBJECTIVE.....	1
B.	SIGNIFICANCE OF THE STUDY.....	1
C.	APPROACH.....	2
1.	MARFORRES Guidance	2
2.	Scope of Research	3
3.	Research Questions	3
4.	Methodology	3
5.	Organization of the Project	4
II.	BACKGROUND.....	5
A.	RESERVE COMPONENTS.....	6
1.	Standby Reserve.....	6
2.	Ready Reserve	7
3.	Retired Reserve	7
B.	MARINE FORCES RESERVE STRUCTURE	8
C.	MARINE CORPS RESERVE TRAINING	9
1.	Marine Corps Reserve Training Terminology	10
2.	Marine Corps Reserve Training Requirements	10
3.	Marine Corps Reserve Retirement Point System.....	11
D.	UNIT TRAINING MANAGEMENT.....	13
1.	Mission Essential Task List (METL).....	13
2.	Annual Training versus Annual General Military Training	14
E.	TIME CONSTRAINTS.....	14
III.	LITERATURE REVIEW	15
A.	MILITARY	15
1.	Too Many Training Requirements	16
2.	Efforts to Reduce Marine Corps Annual GMT Requirements.....	17
3.	Efforts to Consolidate Annual GMT Requirements	19
4.	Current Marine Corps Reserve Annual GMT Requirements.....	22
5.	Reserve Professional Military Education (PME) Requirements.....	24

6.	Sister Services' Approach to Completing Annual Training Requirements.....	25
B.	ACADEMIC	27
1.	Academic and Corporate Shift Toward Online Training	27
2.	Perceived Training Usefulness.....	28
3.	Face-to-Face Versus Online Training	29
C.	DISCUSSION	31
IV.	RESEARCH METHOD.....	33
A.	RESEARCH DESIGN.....	33
B.	DATA REQUEST	34
1.	Command Chronology Cleaning	34
2.	Command Chronology Coding.....	35
C.	INFORMATION REQUEST	36
1.	Data Cleaning.....	37
2.	Coding Scheme for Research Subjects	38
D.	INTERVIEWS	39
1.	Recruitment of Potential Research Subjects	39
2.	Risk Mitigation	42
3.	Conduct of Interviews	43
E.	TECHNOLOGY RESOURCE REVIEW	43
V.	RESULTS AND EXPLORATORY ANALYSIS	45
A.	4TH AABN TRAINING MODEL	45
1.	Annual Training Statistics.....	46
2.	Annual Training Locations.....	47
3.	Effect of Civic Action on 4th AABN.....	48
B.	EXPLORATORY ANALYSIS	49
1.	Results of the Recruitment of Potential Research Subjects.....	49
2.	Individual Perceptions from Interviews	51
C.	OPPORTUNITIES FOR IMPROVEMENT	59
VI.	SUMMARY / CONCLUSIONS / RECOMMENDATIONS	61
A.	CONCEPTUAL FRAMEWORK	61
1.	Command Directed Training.....	62
2.	UMAPIT Mobile Application	62
3.	Dynamic Training Approach	63

B.	CONCLUSIONS, LIMITATIONS, AND RECOMMENDATIONS FOR FUTURE RESEARCH	63
1.	Research Limitations	64
2.	Recommendations for Future Research.....	65
APPENDIX A. MARINE CORPS ANNUAL GMT REQUIREMENTS		67
APPENDIX B. MARINE CORPS RESERVE PME PROMOTION REQUIREMENTS		69
APPENDIX C. INTERVIEW SCRIPT		71
APPENDIX D. COMMAND CHRONOLOGY TRAINING DATA, 2010-2015.....		73
LIST OF REFERENCES.....		75
INITIAL DISTRIBUTION LIST		79

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LIST OF FIGURES

Figure 1.	MCR Components. Adapted from Mills (2014).	6
Figure 2.	MARFORRES Structure. Adapted from Mills (2014).	9
Figure 3.	4th MARDIV Proposed MCBUL 1500 Bundling. Source: Fliegel (2016).	21
Figure 4.	Pivot Table Field List, 4th AABN Training Data.	36
Figure 5.	Pivot Table Field List, 4th AABN Personnel Data.	39
Figure 6.	4th AABN SMCR Annual Required Training Completion, as of November 8, 2016. Source: Command Suite (2016).	54
Figure 7.	RC Annual GMT Model.	61

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LIST OF TABLES

Table 1.	Reference Table for IDT / AD Points. Source: MCO 1001R.1L, (2015).....	12
Table 2.	I MEF OPT Recommended COA. Source: Steinhilber (2016).	19
Table 3.	Advantages and Disadvantages for Online Delivery. Adapted from Maxwell (2012).	30
Table 4.	4th AABN Training Categories.	35
Table 5.	Command Chronology Data Input Example.	35
Table 6.	4th AABN SMCR RUCs.....	38
Table 7.	Composition of 4th AABN, as of August 24, 2016.	40
Table 8.	Potential Interview Subjects, Recruitment One Summary.	41
Table 9.	Potential Interview Subjects, Recruitment Two Summary.	42
Table 10.	Annual Training Conducted Away from HTC, 2010-2015.....	47
Table 11.	4th AABN Travel Time from HTCs to Training Areas.	48
Table 12.	4th AABN Interview Subjects, Recruitment 1.	50
Table 13.	4th AABN Interview Subjects, Recruitment 2.	50
Table 14.	Descriptive Statistics for Research Subjects' Time Assigned to 4th AABN.....	51

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LIST OF ACRONYMS AND ABBREVIATIONS

10 U. S. C.	Title 10 United States Code
AABN	Assault Amphibian Battalion
AAV	Amphibious Assault Vehicle
AD	Active Duty
ADT	Active Duty for Training
APD	Additional Inactive Duty Training Periods
AR	Active Reserve
AT	Annual Training
ATP	Additional Training Periods
BITS	Back in the Saddle
BN	Battalion
BSA	Beach Support Area
C&S	Command and Staff
CAC	Common Access Card
CAN	Center for Naval Analysis
CFT	Combat Fitness Test
CMC	Commandant of the Marine Corps
CNGR	Commission on the National Guard and Reserves
COA	Course of Action
Co	Company
COC	Combat Operations Center
CTIP	Combat Trafficking in Persons
CY	Calendar Year
DOD	Department of Defense
DON	Department of the Navy
DTIC	Defense Technical Information Center
EDP	Equivalent Duty Period
EO	Equal Opportunity
EPME	Enlisted Professional Military Education
ET	Equivalent Training
ETJ	Electronic Training Jacket
EWS	Expeditionary Warfare School
FEX	Field Exercise
FLTMPS	Fleet Management and Planning System
FY	Fiscal Year

GMT	General Military Training
GFM	Global Force Management
HQMC	Headquarters Marine Corps
H&S	Headquarters and Service
HTC	Home Training Center
I&I	Inspector and Instructor
IADT	Inactive Duty for Training
ID	Inactive Duty
IDT	Inactive Duty Training
IMA	Individual Mobilization Augmentee
IRR	Individual Ready Reserve
MAGTF	Marine Air Ground Task Force
MAID-P	Mobilization, Activation, Integration, and Deactivation Plan
MARADMIN	Marine Corps Administrative Message
MARDIV	Marine Division
MARFORRES	U.S. Marine Corps Forces Reserve
MAW	Marine Aircraft Wing
MC	Marine Corps
MCBUL	Marine Corps Bulletin
MCCLL	Marine Corps Center for Lessons Learned
MCI	Marine Corps Institute
MCO	Marine Corps Order
MCR	Marine Corps Reserve
MCTIMS	Marine Corps Training Information Management System
MCTL	Marine Corps Task List
MCWST	Marine Corps Water Survival Training
MEF	Marine Expeditionary Force
MET	Mission Essential Task
METL	Mission Essential Task List
MLG	Marine Logistics Group
MOS	Military Occupational Specialty
M&RA	Manpower and Reserve Affairs
MSO	Military Service Obligation
MT	Mandatory Training
MTU	Mobilization Training Units
NAVADMIN	Navy Administrative Message
NMCI	Navy-Marine Corps Internet
NPS	Naval Postgraduate School
OPFOR	Operational Force
OPT	Operational Planning Team

OPSEC	Operational Security
ORM	Operational Risk Management
OTI	Operations Tactics Instructor
PFT	Physical Fitness Test
PI	Principal Investigator
PII	Personally Identifiable Information
PMCS	Preventative Maintenance Corrective Services
PME	Professional Military Education
POI	Period of Instruction
PTP	Pre-deployment Training Plan
RAND	Research and Development Corporation
RC	Reserve Component
RRC	Reserve Retirement Credit
RUC	Reporting Unit Code
SAPR	Sexual Assault Prevention and Response
SeIRes	Selected Reserve
SMCR	Selected Marine Corps Reserve
SNCO	Staff Noncommissioned Officer
SUL	Small Unit Leader
TAM	Technology Acceptance Model
TEEP	Training Exercise Employment Plan
T&R	Training and Readiness
UA	Unauthorized Absence
UMAPIT	Unit Marine Awareness and Prevention Integrated Training
UTM	Unit Training Management
VP	Violence Prevention

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I. INTRODUCTION

A. OBJECTIVE

The objective of this research is to analyze the impact of increased annual training requirements on the reserve component (RC)—specifically, the 4th Assault Amphibian Battalion (AABN). Time is an enduring constraint for active duty and reserve units; however, this constraint significantly hinders the accomplishment of mission essential task (MET) and annual general military training (GMT) requirements for the RC.

Reserve units train one weekend a month and two weeks in the summer. Approximately 456 hours are allotted to train reserve units to the same proficiency and standard as their active component (AC) counterpart. Previous studies have identified issues with increased annual training requirements and have provided recommendations to “give training time back to the commander.” This research will not identify ways to reduce requirements; rather, it will identify ways that the RC can more efficiently and effectively accomplish annual GMT requirements based on feedback from Marines assigned to 4th AABN.

B. SIGNIFICANCE OF THE STUDY

This study will analyze the methods 4th AABN uses to accomplish annual GMT requirements. Typically, Marine Corps (MC) training requirements are accomplished through unit training and MarineNet, specifically face-to-face and web-based training. During interviews with Marines assigned to 4th AABN, methods of completing annual training requirements were revealed. Accessibility to MarineNet and competing civilian requirements were identified as challenges for accomplishing annual GMT requirements. The research also revealed that Marines are expected to complete GMT classes during non-drill time; however, they are not compensated for their efforts. Data obtained through this research will provide the baseline for improving RC annual GMT.

C. APPROACH

The research approach is designed to address questions raised by Marine Forces Reserve (MARFORRES) regarding the impact of increased annual training requirements. Due to the size of the RC, the scope of the study is narrowed to factors contributing to annual training readiness. A case study of 4th AABN is used to assess how the RC responds to increased training requirements. Both quantitative and qualitative data describing the impacts of increased training requirements on individuals and units were collected and analyzed. Documents required for training analysis were requested. We identified that additional data would be required to understand the impacts of increased training requirements on individuals and units. We felt the best method of obtaining this data would be through phone interviews with reserve personnel assigned to 4th AABN. Once the interviews and data analysis were completed, face-to-face interviews with battalion leadership were conducted.

1. MARFORRES Guidance

The following guidance and questions were presented by MARFORRES during a phone conference with researchers on July 27, 2016, regarding the impact of increased annual training requirements on the RC:

- Do not come back with “annual training requirements need to be reduced.”
- How and where are reserve units conducting training?
- What is the mechanism for training and how effective is it?
- How can we be more efficient and effective with annual training?
- Are there options for Marines getting credit for MarineNet during non-drill periods?
- How are other services conducting training?

2. Scope of Research

Due to the size of the RC and the time constraints for this study, research will focus on one specific unit in the Marine Corps Reserve (MCR). Specifically, this research will focus on the Selected Marine Corps Reserve (SMCR) element of 4th AABN. The responses of 4th AABN to its training requirements may provide insights valuable to other RC units within the MC and within the larger military community. However, since 4th AABN is a ground combat arms unit, the external validity of some of the findings may be narrowed to this type of unit.

3. Research Questions

- What are the impacts of increased annual training requirements on 4th AABN?
- What methods does 4th AABN use to accomplish annual GMT requirements?
- What time and resources are associated with 4th AABN's annual training requirements?

4. Methodology

Research for this study began with a comprehensive review of background information and literature for the topic area. Areas of initial review focused on the following strategic and service-level documents to identify the role of the MCR: Title 10 United States Code (10 U.S.C.), Department of Defense (DOD) directives and instructions, Department of the Navy (DON) orders, Marine Corps orders (MCO) and directives, and reports from Marine Corps Center for Lessons Learned (MCCLL). Once the organizational structure and mission of the MCR were understood, research focused on reviewing military literature pertaining to annual GMT requirements.

Additionally, we analyzed methods used by the sister services and corporate agencies to accomplish annual training goals. The research analyzed training documents and command chronologies obtained from 4th AABN for quantitative analysis. Microsoft Excel was used to compile data and create pivot

tables for analysis. Additionally, we conducted interviews with 4th AABN personnel for qualitative analysis.

5. Organization of the Project

The remainder of this thesis is organized as follows. Chapter II provides the organizational structure and mission of the MCR. Chapter III includes a comprehensive review of military and academic literature pertaining to the topic. Chapter IV describes how the research was conducted. The results of the data obtained from 4th AABN and interviews with personnel involved with RC training are contained in Chapter V. Finally, the last chapter provides a summary of the research, conclusions from the study, and recommendations for future research.

II. BACKGROUND

To accurately frame the problem presented in Chapter I, this chapter provides amplifying details on the MCR and where 4th AABN fits into the organization. This chapter begins with the background section by describing the role and organizational structure of the MCR. This chapter also defines the annual training requirements for the MCR and terminology that will be used throughout the study.

In the *U.S. Marine Corps Service Campaign Plan 2014–2022*, General James Amos states that in order to rebalance the MC toward the future, the MCR will be “used as a general purpose force, continuing to support global force management (GFM) operational requirements consistent with available authorities and resources” (Amos, 2013, p. 15). To accomplish this goal, the total force concept is employed by the DOD, MC, and sister services.

The total force concept, however, is not being used in the manner intended by former Secretary of Defense James Schlesinger. The total force concept was developed in response to the downsizing of the DOD following the Vietnam War, and the policy was never intended to make full-time active soldiers and part-time reservists mirror images of each other (DOD, 1990, p. 4). Despite Secretary Schlesinger’s intentions with the Total Force Policy, Major General Richard Huck made the following comment during his testimony to the Commission on the National Guard and Reserves (CNGR), “The MCR formations mirror those of the AC in their operational force structure and readiness standards. It maintains readiness at the same level as the AC, even though it plans to deploy its members less frequently” (2014, p. 181). The following sections will explain how the RC is organized and the annual readiness standards it must achieve.

1. Reserve Components

10 U.S.C., §10102 states that the purpose of the RC is to “provide trained units and qualified persons available for active duty (AD) in the armed forces, in time of war or national emergency, and at such other times as the national security may require” (Title 10, 1956). The law also requires that the RC be separated into the following components depicted in Figure 1: standby reserve, ready reserve, and retired reserve. Each reserve service member must be placed into one of those components.

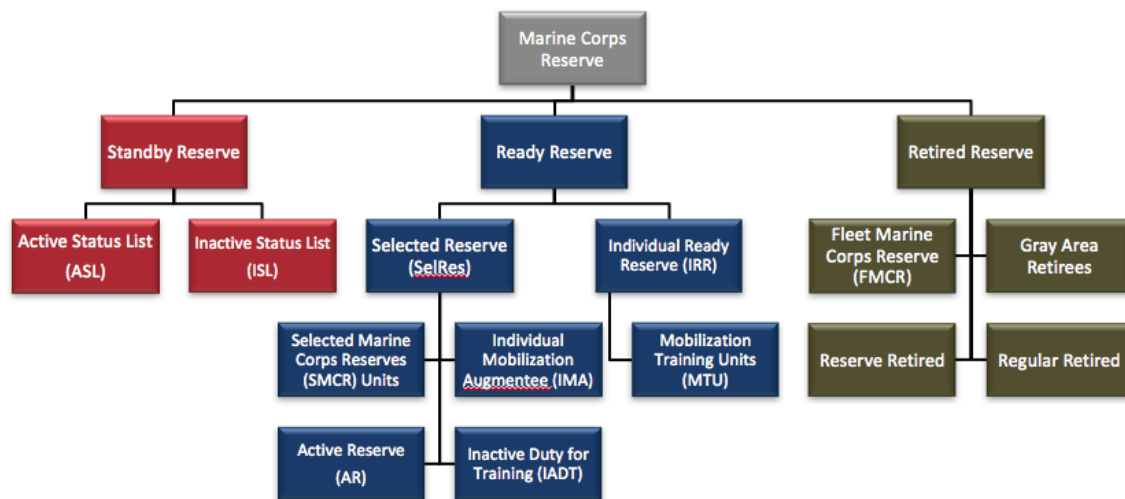


Figure 1. MCR Components. Adapted from Mills (2014).

a. *Standby Reserve*

10 U.S.C., § 10151 states that the standby reserve consists of those units or members, or both, of the RC, other than those in the ready reserve or retired reserve, who are liable for AD only during a time of war or national emergency. If those conditions are not met, a member of the standby reserve cannot be forced into active duty unless the service secretary, with the approval of the secretary of defense, identifies that there are not enough ready reserve personnel to accomplish the mission.

b. *Ready Reserve*

The ready reserve consists of units or reserves, or both, liable for AD (Title 10, 1956). Within the ready reserve are two other elements: selected reserve (SelRes) and individual ready reserve (IRR). The elements of the ready reserve are as follows:

- SelRes: The SelRes is that part of the ready reserve consisting of Marines of SMCR units, individual mobilization augmentees (IMA), reserve Marines serving on the active reserve (AR) program, and reserve Marines serving on initial active duty for training (IADT).
- SMCR: Consists of drilling reservists who belong to 4th Marine Division (MARDIV), 4th Marine Logistics Group (MLG), 4th Marine Aircraft Wing (MAW), and force level units of U.S. Marine Corps Forces Reserve (MARFORRES). This section of the RC will be the focus of this research.
- AR: Marines who are part of the SelRes on full-time active duty for the purpose of organizing, administering, recruiting, instructing, or training the RC.
- IMA: An individual member of the SelRes who receives training and is pre-assigned to an AC organization. IMAs train with these organizations on a regular and scheduled basis.
- IADT: IADT is authorized training performed by members of the ready reserve not on AD and performed in connection with the prescribed activities of the units which they are members.
- IRR: A trained manpower pool of ready reserve Marines who are not in the SelRes.
- Mobilization Training Units (MTU): A unit established to provide RC training in a non-pay status for volunteers of the IRR and the standby reserve attached under competent orders and participating in such units for unpaid inactive duty training (IDT) retirement points (MFR, n.d.).

c. *Retired Reserve*

Reservists who are retired fall into this category.

2. Marine Forces Reserve Structure

The Total Force MC comprises AC and RC elements. Lieutenant General Richard Mills, commander of MARFORRES states the following regarding the importance of the RC in the Vision and Strategy 2014–2019 document:

We will continue to be an integral component of the Total Force MC, ensuring the Service achieves its roles and missions. The reduction in MC AC end-strength requires the Total Force to function at a higher operational tempo with consequential shorter dwell times. This encompasses a degree of risk in the ability to simultaneously respond to multiple large scale contingencies. This risk can be mitigated by the integration of MARFORRES units and individuals into the sourcing equation for Service and Combatant Commander requirements (2014, p. 1).

In keeping with the Total Force MC concept, MARFORRES is structured like its AC counterparts. Figure 2 depicts the structure of the MARFORRES Marine Air Ground Task Force (MAGTF), which has a command element, ground combat element, logistics combat element, air combat element, and force headquarters group. This study will focus on 4th AABN, a subordinate unit within the ground combat element. 4th AABN is annotated in Figure 2 with a star.

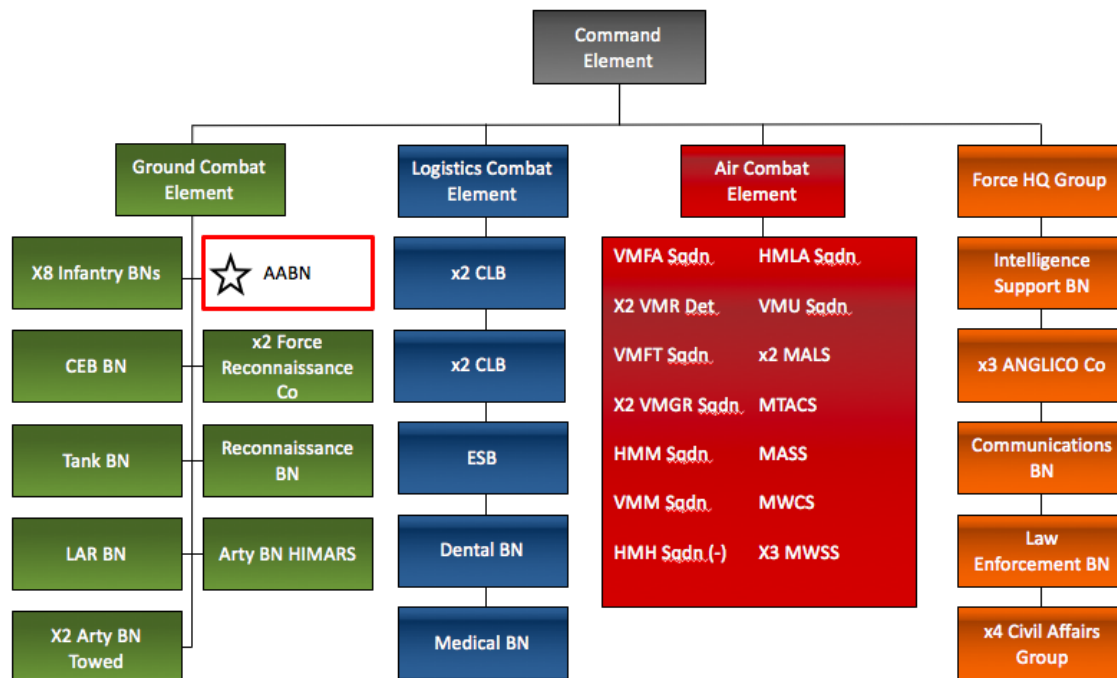


Figure 2. MARFORRES Structure. Adapted from Mills (2014).

3. Marine Corps Reserve Training

As previously mentioned, the RC structure and training requirements mirror the AC; however, there are key differences between the RC and AC that need to be understood. Chapter 3 of MCO 1001R.1L, *Marine Corps Reserve Administrative Management Manual*, clearly defines reserve duty and training requirements. The following excerpt from MCO 1001R.1L emphasizes that the purpose of reserve training is to enhance individual skills and unit effectiveness:

Reserve Marines will receive training pursuant to assignments and required readiness levels. Required training will provide the minimum training time or number of training periods required for attaining the prescribed unit readiness status and maintaining individual proficiency. The primary purpose of all training is the enhancement of individual skills and/or unit effectiveness (2015, p. 3–1).

To effectively analyze the business practices 4th AABN employs to accomplish annual GMT requirements, this section will highlight key terminology from MCO 1001R.1L. This section will clarify the following: reserve training

terminology, training requirements for reserve Marines to have a qualifying year of service, and the point system for reserve retirement.

a. Marine Corps Reserve Training Terminology

Training for a reserve Marine is conducted in an inactive duty (ID) or AD status, which consists of voluntary and involuntary training duty (MCO 1001R.1L, 2015, p. 3–1). The duties each Marine performs, whether it is on ID or AD, is based on multiple factors. Some of these factors include the mission of the unit, budgetary constraints, and the personal situation of the Marine. The following terms selected from MCO 1001R.1L are important for furthering the research of this project:

- AD: Includes full-time AD training, annual training (AT), active duty other than for training (ADOT), and full-time attendance at a military school.
- AT: This is the minimum period of active duty training (ADT) that reserve members must perform each year.
- ID: Authorized duty performed by reserve Marines not in an AD status that consists of IDT.
- IDT: Performed by members of the Ready Reserve not on AD, AT, or ADT that consists of regularly scheduled unit training periods, additional IDT periods, and voluntary IDT. IDT may not be used for completing correspondence courses.
- Additional IDT Periods: These are also known as additional paid drills (APDs). These are designed to improve unit readiness; however, they are accounted for separately from normal unit or individual training periods and do not count against the 48 paid IDT periods (2015).

b. Marine Corps Reserve Training Requirements

10 U.S.C., § 10147 states the following regarding the training requirements for ready reserve Marines, “[they] must participate in at least 48 scheduled drills or IDT periods during each year and serve on AD for training of not less than 14 days during each year; or serve on AD for training not more than 30 days during the year.” MCO 1040R.35, *Reserve Career Retention*

and Development Manual, continues by stating that “the two-week period of annual training (AT) is normally performed with the unit but may consist of a formal Reserve school to enhance specific skills” (2011, p. 7–1).

c. *Marine Corps Reserve Retirement Point System*

For a reserve Marine to receive credit for a qualifying year of service, they must obtain 50 points. MCO 1001R.1L outlines the manner for obtaining reserve retirement points. Retirement points can be earned in the following ways: “one AD point for each day of service on AD, or up to two points per day IDT performed with or without pay. One point may be awarded per four-hour period of IDT or two-hour period of funeral honor duty (FHD)” (2015, pp. 4–1 & 4–2). For example, an SMCR Marine who attends 48 scheduled drills throughout the year would receive 48 reserve retirement points [one IDT point per four-hour period, two points maximum per day]. During AT, they could receive an additional 14 reserve retirement points [one AD point per day] for a total of 62 points for the year. Table 1 displays methods that RC Marines can earn retirement points.

Table 1. Reference Table for IDT / AD Points.
Source: MCO 1001R.1L, (2015).

TYPE DUTY	MINIMUM TIME REQUIRED	AUTHORITY REQUIRED	IDT POINTS	AD POINTS	MAX # PTS
ADOS, EAD, or ADT	1 Day	Orders		1	365,366 /year
Associate	4 Hours	Orders	1		2/day
Appropriate	4 Hours	Orders	1		2/day
Seminars/ Conferences	4 Hours	Orders	1		1/day
Physical Exam	4 Hours	As Directed	1		2/year
Acquire 1 enlistment or 1 officer accession in USMC/USMCR	20 Hours Equivalent	CO RS Approval	10		40/yr
MCJROTC Unit Assistance	4 Hours	CO MCD Approval	1		2/day
Acquire 1 PS IRR who fills SELRES billet	12 Hours Equivalent	Dir MCIRSA Approval	6		36/year
Correspondence Studies	4 Hours	Dir MCI/Other Service	1		N/A
Membership	1 Year	MCR Membership	15		15/year
IDT periods	4 Hours	UMS	1		2/day
AFIP/ATP	4 Hours	UMS	1		2/day
RMP	4 Hours	UMS	1		1/day
EIO/EIN	4 Hours	UMS	1		2/day
FHD/MFH	2 Hours	UMS	1		1/day
MTU meetings	4 Hours	UMS Membership	1		2/day
MTU Command Duty	4 Hours	OIC, MTU Approval	1		2/day
MTU Instruction Preparation	4 Hours	OIC, MTU Approval	1		2/day

As depicted in Table 1, correspondence studies require four hours in order to receive one IDT point; however, it does not provide details for IDT points that can be earned for conducting annual GMT requirements. As such, MCO 1001R.1L states the following regarding correspondence and non-resident courses:

- All MC PME, to include correspondence and non-resident courses, is applicable to the Total Force.
- A reserve Marine may voluntarily complete correspondence or non-resident courses for reserve retirement credit while in an unpaid status.

- Reserve Marines may be credited with retirement points at the rate of one point per four hours of non-resident instruction successfully completed.
- This policy is established in order to incentivize non-paid, off-drill, individual education and consequently allow for more time to execute hands-on, unit training during IDT periods
- No retirement points can be earned for courses conducted during periods of IDT, AD, or other periods in which retirement points are awarded (2015, p. 3–14).

4. Unit Training Management

MCO 1553.3B, *Unit Training Management (UTM) Program*, establishes how the MC conducts unit training. This document provides guidance to commanders for conducting unit training. Annual training requirements for the MC consist of METs and GMT.

a. Mission Essential Task List (METL)

The METL consists of tasks that a unit must be able to accomplish. They include Core METs and Core Plus METs.

(1) Core METs

Core tasks that a unit must be able to accomplish that are listed in respective Training and Readiness (T&R) manuals. For example, one Core MET for the AABN is to “Conduct Amphibious Operations.” Core METs are listed in the Marine Corps Task List (MCTL).

(2) Core Plus METs

In addition to Core METs, Core Plus METs are additional tasks that a unit must be able to accomplish based on higher headquarters’ guidance. Core Plus METs are mission specific and are tasks in addition to the Core METs.

b. Annual Training versus Annual General Military Training

It is important to differentiate between AT and GMT as it relates to this study. AT refers to the two-week period that SMCR individuals spend in an AD status each year. GMT, on the other hand, refers to the annual requirements that each individual Marine (AC or RC) must complete. Marine Corps Bulletin (MCBUL) 1500, *Annual Training and Education Requirements*, specifies the individual annual training requirements (GMT) that must be completed each year. MCBUL 1500 combines the annual training requirements directed by DOD, Department of the Navy (DON), and the MC into one document. These training requirements will be discussed more in depth in Chapter III.

5. Time Constraints

If we assume the length of an IDT period is six hours and the length of an AD period is 12 hours, the total time a reserve unit has to train each year is 456 hours. This number is significantly lower than the time available for AC training; however, the RC is expected to accomplish the same amount of annual training (METs and GMTs) with significantly less time.

$$TngTime = (IDT * 6) + (AD * 12)$$

$$TngTime = (48 * 6) + (14 * 12)$$

$$TngTime = (288) + (168)$$

$$TngTime = 456hrs$$

During that limited time, units do the best they can to train their personnel; however, competing requirements such as medical and dental readiness, the annual MC Ball, Toys-For-Tots, full-time education, and civilian jobs reduce opportunities for training. Time constraint is an enduring factor which forces commanders to assume risk by prioritizing training requirements. This research is focused on identifying ways that the RC can be more effective and efficient with their annual training.

III. LITERATURE REVIEW

A conceptual review of military and academic literature was conducted in an effort to understand what studies reveal about training methods. The literature review was conducted in two stages: military literature review and academic literature review. First, we reviewed military papers that were written at Naval Postgraduate School (NPS), Expeditionary Warfare School (EWS), Command and Staff (C&S), and other military publications concerning reserve annual GMT requirements. Following the military literature review, we analyzed academic literature that focused on training methods used by corporations in various job markets.

A. MILITARY

The military literature review began with searches conducted on MCCLL, Defense Technical Information Center (DTIC), and ProQuest using the following search terms: annual training, general military training, and reserve training. Based on the results from this search criteria, we were able to identify pertinent articles and papers that pertained to the MCR and sister service reserve forces.

Most important to the military literature review were discussions with MARFORRES personnel regarding annual GMT requirements and the impact it is having on the operational forces (OPFOR). During these discussions, we were able to appreciate the measures previously taken to reduce annual GMT requirements across the MC. Additionally, through these conversations it appeared that the GMT requirements would not go away. We also identified there are no plans to re-energize the effort to reduce reserve annual training requirements. As such, a more efficient and effective solution for accomplishing annual training requirements is needed.

1. Too Many Training Requirements

Parrish (2008) highlights issues with the current training plan for the RC in his thesis, "Improving the Marine Corps Reserve Infantry Battalion: Manning, Training, Integration, and Retention" by presenting the following:

While reserve Marines are generally expected to be equipped and trained to the same standards as active Marine forces, time and cohesive leadership become the critical vulnerabilities in ensuring all annual training standards are achieved." (p. 12)

Cahoon (2009) has similar views regarding annual training requirements for the RC. He writes the following in his paper titled "The Increase in Training Requirements Is Having an Adverse Impact on Technical MOS Proficiency":

Leaders are focusing their primary efforts that ensure their Marines are maintaining a deployable status by accomplishing the ever-growing number of training requirements that are being reported and tracked (p 10).

In 2012, military students at EWS conducted a study titled "Force Generation and Unit Training" in response to a Center of Naval Analyses (CNA) white paper regarding annual training requirements. One finding from the study is that 45 days are required to conduct annual training and education requirements for Marines (P. Haagenson, personal communication, May 11, 2016). Additionally, the study highlighted that training requirements listed in MCBUL 1500 are not the only requirements—there are also ancillary training requirements that Marines are expected to complete each year like the Commandant of the Marine Corps' (CMC's) reading program.

The DOD identified a need to revise the annual training requirements for the services. In 2012, RAND Corporation conducted a study of the annual training requirements of each service. Prior to conducting the study, RAND provided the following background information for the research:

GMT requirements are the same for the AC and RC. However, AC personnel have greater availability for training while RC personnel normally drill one weekend per month and complete a two-week training period during the year. Therefore, although the time it

takes to perform mandatory GMT is equal for the AC and RC, the time available for drilling reservists to complete requirements is less. And, with similar GMT demands, the time required to complete mandatory GMT requirements consumes a larger portion of an RC member's available training time. (Yardley, Woods, Ip, & Sollinger, 2012, p. xiii)

Upon completion of the study, RAND provided the following definition of GMT as it relates to the military services: "periodic, nonoccupational directed training that provides common knowledge and skills required for all uniformed personnel. Ancillary training or GMT enhances an individual's ability to perform military duties or activities" (Yardley et al., 2012, p. xiv). A secondary objective of the RAND study was standardization of GMT across the services. Regardless of standardization across the services, the GMT requirements are still there.

2. Efforts to Reduce Marine Corps Annual GMT Requirements

Information in this section is paraphrased from a phone conversation conducted on July 21, 2016, between the researchers and Erik Doyle, Combat Development and Integration (CD&I) Director of Operations. The background information obtained during this interview provided a starting point for this research.

Former CMC General Amos was receiving feedback from MC units and Marines that Headquarters Marine Corps (HQMC) requirements were making it difficult for commanders to accomplish their mission. It was identified that although there were 500–600 MCOs directing training requirements, only a small percentage of those orders affected commanders. Based on this information, an operational planning team (OPT) was formed to identify factors that cause friction for commanders.

The OPT was titled "What Puts Rocks in the Rucksack?", and there were five lines of effort that focused on training: HQMC directed training, directed surveys, recurring reports requirements, collateral duties, and MCOs. The analysis of directed surveys and recurring reports requirements did not provide

much information on reducing the annual burden on commanders. The OPT also identified that collateral duty requirements do not create much friction for commanders. Initial research revealed that annual GMT requirements were creating the most friction for commanders. This information was presented to General Amos during the executive offsite in April 2014 and he tasked Lieutenant General John Toolan, Commander of I Marine Expeditionary Force (MEF), with analyzing annual GMT requirements.

The goal of I MEF's OPT was to identify annual training tasks that could be reduced, thus minimizing HQMC's impact on OPFOR commanders. The OPT stated the following regarding how training was being conducted:

At the unit level, attention needs to be paid to the method we use for training. Tradition says the MarineNet is required to be used for many requirements—in fact only the DOD mandated annual cyber training is required to be conducted by MarineNet for uniformed Marines. While it may be easier (for small unit leaders) to use MarineNet—it results in less than ideal training (C. Steinhilber, personal communication, April 13, 2016).

Upon conclusion of the OPT, a proposed course of action (COA) was provided to the CMC, which is highlighted in Table 2. Of note, there were opposing views by OPT members regarding the frequency of rifle, pistol, and combat water survival. Some members believed that these requirements are fundamental for Marines while others thought these they should be reduced to minimize the annual training burden on commanders.

Table 2. I MEF OPT Recommended COA. Source: Steinhilber (2016).

Training and Education	Proposed Frequency (Recommended Changes in Green)
Substance Abuse	Annual
Sexual Assault Prevention and Response	Annual
OPSEC	Every 4 yrs / PTP / PCS Check-in
ORM	Bi-annual
EO and Sexual Harassment	Annual
Level I AT Awareness	Every 4 yrs / PTP / PCS Check-in
Cyber Awareness (PII and IA)	Bi-annual
Hazing	Bi-annual
Combat Water Survival	As Required (MSC CG)
CBRN Defense	Bi-annual / 6 months prior to deploy
Rifle Range	Bi-annual for SSgt and above / PTP
Pistol Range	Bi-annual / PTP
PFT	Annual
CFT	Annual
Aviation Swim Qual	T/M/S or unit shipboard deployment
Combat Conditioning	Weekly
MCMAP	As Required / Flt Status Exempt
Suicide Prevention and Awareness	Annual
DRIVESAFE (Vehicle) *Under 26 years old	One-time / Age Dep (<23 y/o)
There are Many Options Available to Reduce Impact on OPFOR Commanders	

Finally, another way the MC has attempted to reduce the training burden is through the implementation of Unit Marine Awareness and Prevention Integrated Training (UMAPIT). When UMAPIT was developed, the intent was to reduce required annual training redundancies within the MC, focusing on the following areas: combating operational stress control, substance abuse, family advocacy, and suicide prevention and response. UMAPIT is designed to be delivered to groups of 30 Marines and attached Sailors or fewer in an interactive manner, at the unit level, and facilitated by a leader that is familiar with the course material (C. Steinhilber, personal communication, April 13, 2016).

3. Efforts to Consolidate Annual GMT Requirements

In addition to GMT reduction attempts, 4th MARDIV conducted multiple OPTs in 2015 in an effort to consolidate annual training requirements. 2d

Battalion, 25th Marines, a reserve infantry unit, was used to demonstrate time that is available for training. This study argued that there are 576 hours available during 48 drill periods for the unit to train—this does not include the two weeks of AT. For 2d Battalion, 25th Marines, training time was allocated as follows:

- 100 hours: reset, refit, and unit cohesion periods. This included the MC Ball, Lance Corporal Seminar, and post-AT family day.
- 60 hours: medical and administrative readiness.
- 164 hours: equipment maintenance.
- 140 hours: annual GMT and inspection requirements.
- 48 hours: movement to and from training areas.
- 20 hours: training remediation.
- 44 hours: estimated MET reserve training hours (D. Fliegel, personal communication, October 13, 2016).

Time available for training is overestimated with the 4th MARDIV study because it is assuming that units have 24 hours per day for training. Although the time available for training is inaccurate, it is important to point out some of the competing requirements for time: unit cohesion periods, medical and administrative readiness, equipment readiness, movement to and from training locations, MET training, and GMT. In an effort to streamline training, 4th MARDIV identified the following regarding annual training requirements.

- Most MCBUL 1500 training does not have to be delivered on MarineNet.
- Periods of instruction (POI) do not specify a method of delivery or the required class length.
- MarineNet has driven leaders out of annual training and forces MC requirements to be accomplished during non-drill time with poor completion rates.
- Classes such as sexual assault prevention and response (SAPR) and UMAPIT require trained instructors (D. Fliegel, personal communication, October 13, 2016).

Figure 3 captures the efforts of 4th MARDIV to streamline annual GMT requirements. 4th MARDIV recommended dividing the 18 annual GMT requirements into ethics, pre-deployment training plan (PTP), MarineNet, administrative and health, and security bundles. These bundles were categorized as training that is offered on MarineNet, instructor taught, and MarineNet required. Additionally, 4th MARDIV made recommendations to reduce the frequency of training requirements. For example, equal opportunity and hazing were recommended to occur bi-annually or in conjunction with a new commander's assumption of command (D. Fliegel, personal communication, October 13, 2016).

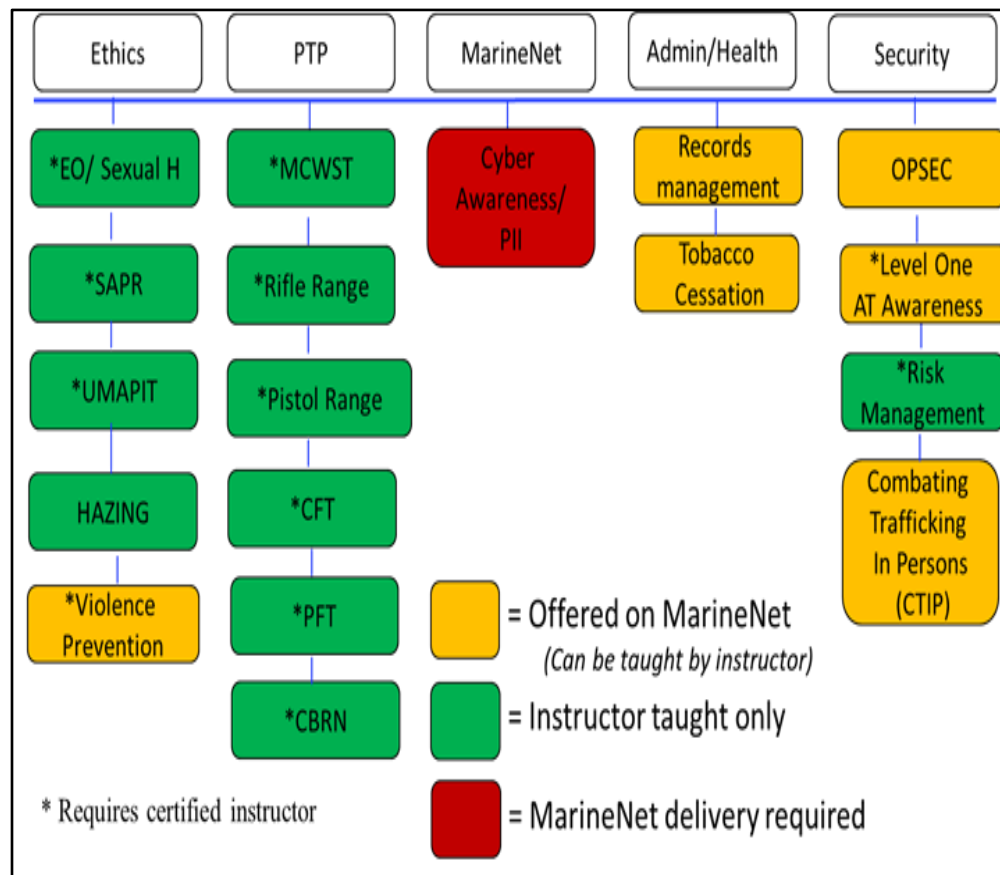


Figure 3. 4th MARDIV Proposed MCBUL 1500 Bundling.
Source: Fliegel (2016).

4. Current Marine Corps Reserve Annual GMT Requirements

As mentioned in Chapter II, annual GMT requirements for Marines are specified in MCBUL 1500. The most recent MCBUL 1500, published on February 20, 2015, states that the purpose of the document is “to create efficiencies in training and optimize time available to unit commanders to conduct METL based training.” Additionally, this bulletin states that all Marines, AC and RC, must complete annual GMT:

Due to the importance to overall force readiness, the training of certain subject matter is required by law, DOD, DON, or the CMC through Headquarters Marine Corps (HQMC). The training of these events is required for all members of the service, regardless of MOS or rank/grade or component, unless otherwise exempted or waived (U.S. Marine Corps, 2015a, pp. 1 & 2).

MCBUL 1500 consists of 18 annual GMT requirements mandated by DOD, DON, and MC, which can be found in Annex A. Of these requirements, the number of training events with the respective organizational mandate are as follows: 11 DOD, 1 DON, and 6 MC. The training methods employed by the MC to accomplish annual GMT requirements are divided in MCBUL 1500 as unit training and MarineNet based training. Examples of unit training as a means for accomplishing training are PowerPoint presentations given by a small unit leader, guided discussions, or field training (i.e., rifle range and water survival training). MarineNet, on the other hand, is a web-based program that offers various online training opportunities.

The method that a unit uses to accomplish the annual GMT requirements is up to the commander; however, annual cyber awareness training (which includes personally identifiable information (PII) and information assurance (IA)) is the only training required to be conducted using MarineNet (U.S. Marine Corps, 2015a). Other annual GMT requirements that are available via MarineNet are as follows:

- DD01AO0000: Combat Trafficking in Persons (CTIP) General Awareness Training

- ILEVPPA01A: Violence Prevention (VP) Program Awareness
- M01RMT0700: MC Records Management Course
- JATLV10000: Joint Anti-Terrorism Level 1
- OPSECUS001: Uncle Sam's Operational Security (OPSEC)
- SFTOBCESS0: Semper Fit: Tobacco Cessation

Currently, there are annual GMT requirements that must be accomplished using unit training instead of MarineNet. There are three reasons that specific requirements must be accomplished via unit training: 1) a MarineNet class does not exist for the training; 2) the training cannot be accomplished using MarineNet (i.e., marksmanship training); or, 3) the class requires personnel with designated credentials to teach the material (i.e., SAPR). The following annual GMT requirements are accomplished with unit training:

- MC Water Survival Training (MCWST)
- Hazing
- SAPR
- Chemical, Biological, Radiological, and Nuclear Defense Training
- MC Combat Marksmanship | Rifle
- MC Combat Marksmanship | Pistol
- Operational Risk Management (ORM)
- MC Equal Opportunity (EO) and Sexual Harassment
- MC Physical Fitness Program | physical fitness test (PFT)
- MC Physical Fitness Program | combat fitness test (CFT)
- UMAPIT

Based on annual GMT requirements that utilize unit training as the method of completion, opportunities exist to gain effectiveness and efficiencies for training the RC. For example, MarineNet courses for hazing and ORM could be developed so that Marines could complete the training on their own. Additionally,

the UMAPIT website has great resources on family care, family readiness, personal and professional development, military personnel services, behavioral health, semper fit and recreation; however, the site is common access card (CAC) enabled which creates issues for reserve Marines attempting to gain access when they are away from the home training center (HTC).

Current annual GMT training conducted on MarineNet does not earn an individual reserve retirement credit (RRC). This has the potential to create second and third order effects for a reserve unit if Marines are expected to complete annual GMT MarineNet training during non-drill time. Marines are not compensated for GMT completion, thus the incentive to conduct this training is low. Assuming that time was not allotted in the training schedule for annual GMT training, the unit is now forced to adjust other MET requirements to complete the individual GMT requirements. This topic will be discussed more thoroughly in Chapter V as reserve Marines voiced concerns with annual GMT completion using MarineNet during non-drill time.

5. Reserve Professional Military Education (PME) Requirements

While the MC was looking for ways to reduce the annual training burden on its commanders, MARADMIN 521/14 was released which updated enlisted professional military education (EPME) promotion requirements by grade. This message also announced a new requirement for command-sponsored lance corporal leadership course. Annex B highlights the SMCR enlisted PME promotion requirements; however, this study will highlight the command-sponsored lance corporal leadership course.

As of 2014, lance corporals are required to complete MarineNet EPME 3000AA (Leading Marines Distance Education Program) or Marine Corps Institute (MCI) 0037 (Leading Marines) in order to be promoted to corporal. Currently, lance corporals must complete MarineNet EPME 3000AA and then complete a command-sponsored lance corporal leadership and ethics seminar. MarineNet EPME 3000AA consists of the following sub courses: Administration

and Communication, Warfighting, Military Organization, Developing Leaders, Leadership Tools, and Your Readiness. The estimated time to complete the MarineNet EPME 3000AA course is 16 hours; however, the reserve Marine receives 4 RRC points. Upon completion of MarineNet EPME 3000AA, the Marine can attend the command-sponsored lance corporal seminar. The syllabus provided by the Enlisted Professional Military Education site on Marine Corps University's webpage estimates two days to complete the course. The implementation of the command-sponsored lance corporal seminar has created concerns within 4th AABN which will be discussed in Chapter V.

6. Sister Services' Approach to Completing Annual Training Requirements

This study not only looked at how the MC completes annual GMT requirements, it also analyzed how the other military services were accomplishing annual training requirements. The U.S. Army provides guidelines for conducting annual training in Army Regulation 350–1, *Army Training and Leader Development*. This document is similar to MCBUL 1500; however, weapons qualification occurs at different frequencies for the RC and AC (RC qualifies once a year, AC qualifies twice a year). Additionally, RC individuals are required to conduct employment and reemployment rights training—a requirement that the AC does not have to complete.

The U.S. Navy, on the other hand, provides annual GMT training guidance via Navy Administrative Messages (NAVADMIN) where requirements are separated into the following categories: required face-to-face, required using standardized training products, or required when appropriate based on command schedule. NAVADMIN 166/16, *Fiscal Year 2017 (FY-17) General Military Training Schedule*, states the following regarding training, “FY-17 GMT places additional control at the discretion of local command leadership in determining what training is required and how often it must be accomplished.” As such, the only required face-to-face training requirements are SAPR, EO/Sexual

Harassment/Grievance Procedures, and Suicide Prevention (NAVADMIN 166/16). The following Navy annual GMT requirements are completed using face-to-face or individual completion via Navy Knowledge Online (NKO):

- CTIP
- Cyber Security Awareness
- AT Level 1 Awareness
- Counterintelligence Awareness and Reporting
- OPSEC
- Privacy and PII
- Records Management

The Navy is also looking at ways to make training easier and more convenient. There are currently four GMT mobile applications available: Domestic Violence Prevention and Reporting, OPSEC, Records Management, and PII (NAVADMIN 166/16). The opening screen of the Domestic Violence Assessment mobile application provides the following information to receive credit for the training:

Upon successful completion of the Domestic Violence Assessment, you may click the “complete” icon at the bottom of the screen to notify Fleet Management and Planning System (FLTMPS) via email to record your progress in activity training status reports. You will be prompted to enter your 10-digit DODID number from your CAC in the email to ensure that your completion is correctly posted. Sailors successfully completing training on the mobile application can expect completions to be visible in their electronic training jacket (ETJ) within two working days (Domestic Violence Prevention, 2016).

RAND provided the following observation regarding MC reserve training during their 2012 study of annual GMT requirements:

An issue for MC reservists is access to computers for distance or online training. As the MC begins to include more ancillary training topics on MarineNet, this shortfall will become more acute. Reserve officials voiced concerns about this shortfall while continuing to stress the value of providing a maximum amount of flexibility

with regard to delivery options. (Yardley et al., 2012, p. 88).

Perhaps the Navy is on to something with the development of mobile applications for annual GMT requirements that are linked with Navy training databases.

B. ACADEMIC

The military literature review provided information on methods used to accomplish annual GMT requirements. In the corporate world, organizations are required to complete similar annual training requirements. Additionally, academic institutions over the past ten years have been experimenting with different methods for educating their students to include face-to-face instruction and e-learning. Although there is significant literature differentiating between education and training accomplishment, the purpose of the following section is to demonstrate that technological advancements are helping to improve corporations and academia. The academic literature review began with searches on DTIC and ProQuest using the following search terms: methods of training, corporate training, and online training. Relevant articles from *Human Resource Development Quarterly*, *Researcher's World*, and *International Journal of Information Management* were used to facilitate the academic literature review.

1. Academic and Corporate Shift Toward Online Training

To remain competitive in today's technological environment, academia and corporations are experimenting with methods to effectively train their personnel. An example that highlights the use of technological advances is from Reddy's article "Online Training Keeps Companies in Compliance", "Lockheed Martin Corporation, which developed computer ethics courses in-house in the early 1980s, said that the cost savings slashed its training budget by two-thirds" (2001, p. 2).

Barnes and Blackwell, professors at Nova Southeastern University, wrote an article in 2004 titled "Taking Business Training Online: Lessons from Academe." This article summarized their observations and research from

teaching over four years of online business courses to graduate and undergraduate students. In this article, the authors state that classroom-based instruction was the primary means for education and corporate training (2004, p. 3). Barnes and Blackwell continue by stating the following:

Because of the cost advantage, convenience of scheduling and ease of tailoring delivery to student needs, online corporate training is likely to continue its explosive growth at least for several more years. Online learning accounted for more than 20% of commercial training undertaken in the U.S. in 2000 (2004, p. 7)

Lim, Lee, and Nam presented similar observations in their 2007 article titled “Validating E-Learning Factors Affecting Training Effectiveness.” In this article they demonstrate that organizations are adjusting business structures to remain competitive. Additionally, businesses are developing information technology to replace traditional vocational training with e-learning to better manage the workforce (Lim, Lee, & Nam, 2007, p. 22).

2. Perceived Training Usefulness

Lim, Lee, and Nam provide recommendations that affect the usefulness of online training. One of the recommendations they provide is that online education has to be easy to use (Lim et al., 2007, p. 23). Barnes and Blackwell recognize that testing is not given as much importance in corporate training as it has in academia, so they provide the following modified recommendations for corporate training programs:

- Require a minimum passing grade in order to have the course go on the student’s corporate training manuscript.
- Make sure the evaluation techniques relate directly to on-the-job performance.
- Keep the technology requirement at the lowest possible common denominator. In other words, keep the technology friendly (Barnes & Blackwell, 2004)

Davis conducted research on the technology acceptance model (TAM) in 1997 that provides a different perspective on perceived training usefulness. "TAM specifies the causal relationships between system design features, perceived usefulness, perceived ease of use, attitude toward using, and actual usage behavior" (Davis, 1993, p. 475). Davis' research demonstrates that perceived usefulness is more of a factor in training completion than the actual usefulness. Specifically, Davis makes the following statement regarding his research:

Perhaps the most striking finding was that perceived usefulness was 50% more influential than ease of use in determining [technology] usage, underscoring the importance of incorporating the appropriate functional capabilities in new systems (1993, p. 475).

3. Face-to-Face Versus Online Training

In 2008, Dillon, Dworkin, Gengler, and Olson conducted a study that compared face-to-face versus online delivery for training professionals. In this study, they compared 165 face-to-face and 73 online deliveries and found the following:

- Face-to-face course averaged 3.2 hours.
- Online course averaged 1.75 hours.
- Face-to-face course: 62% of participant's time was spent on discussion, 23% was spent on content, and 15% was spent on administrative tasks.
- Online course: 24% of participants' time was spent on discussion, 61% was spent reviewing course content, and 15% was spent on navigation and administrative pages.
- Conclusion: Online participants spent more time engaged with course content than face-to-face participants, who spent nearly two thirds of their time in discussions (Dillon, Dworkin, Gengler, & Olson, 2008, p. 31).

Similarly, Maxwell conducted a study in 2012 that compared the advantages and disadvantages of conducting online training. Maxwell states the following regarding the usefulness of online training, "With its versatility and

interconnectedness, the web offers one of the most effective ways to deliver training to geographically widely-spread settings” (p. 89). Maxwell also suggests that the following tools can be used to enhance the online learning experience: online databases, tools for quizzes or tests, cases, questions, problems related to classroom material, online course evaluation, collaboration, digital libraries, web link tools, and whiteboard (p. 89).

Furthermore, Maxwell (2012) demonstrates that online training cannot be used to accomplish every possible training requirement. She states that “managers and training departments need to determine when and if online training is a viable strategy” (p. 92). Finally, Maxwell articulates that “online methods should be used in conjunction with other modalities in a blended learning format” (p. 92). Online training can be used in the following ways: a sole source of learning, supplemental traditional, follow-up to traditional, or alternative to traditional. Organizational structure and training objectives will determine the model used to present information to students and employees alike. Table 3 summarizes Maxwell’s perspective regarding advantages and disadvantages for online delivery.

Table 3. Advantages and Disadvantages for Online Delivery.
Adapted from Maxwell (2012).

Advantages for Online Delivery	Disadvantages for Online Delivery
<ul style="list-style-type: none"> • Eliminates geographic barriers • More diverse curriculum offerings possible • Flexibility of scheduling personal time • Eliminates or reduces travel time and need for transportation • Individualized attention for the instructor • Provides a format for self-paced learning • Instruction can be customized and flexible 	<ul style="list-style-type: none"> • Capital intensive for delivery systems and resources • Frustration with technical problems • Challenging to maintain sufficient learner contact, assistance and feedback

C. DISCUSSION

Previous military research focused on pointing out that there are too many annual training requirements and not enough time to complete them; however, the recommendations focus on combining or reducing the requirements. Since the annual training requirements for the RC will not be reduced, the MC method of unit training combined with MarineNet needs to be reevaluated. The Navy is developing innovative ways to make annual training more accessible through annual GMT mobile applications. There are also opportunities to improve training effectiveness and efficiency in the RC by incentivizing Marines during non-drill time to accomplish annual GMT requirements. Additionally, the findings in academic literature revealed the following themes regarding online training: it needs to be developed correctly, it needs to be easy to use, and it needs to be accessible to its users.

The following chapter will describe the research method used for this study and will seek to answer the following question: There are only 18 annual GMT requirements—why are they so hard to complete?

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IV. RESEARCH METHOD

This empirical study of annual training requirements for the RC focuses on a small element of MARFORRES, specifically 4th AABN. First, we conducted a comprehensive literature review followed by interviews with military personnel affiliated with the RC. For the literature review, we analyzed U.S. national documents, U.S. military doctrine, and best practices to gain an understanding of how annual training is conducted. We also conducted a comprehensive review of academic literature to understand how corporations complete annual training requirements. Once we had an understanding of the problem, we requested annual training data from 4th AABN. Additionally, we requested approval from 4th AABN to conduct interviews with Marines assigned to the unit. Finally, we combined information obtained from the interviews and annual training data from 4th AABN to build a model for annual GMT improvement. Based on the results of the interviews and data analysis, we formed a hypothesis for factors that contribute to annual training statistics for 4th AABN. The model and hypothesis will guide further research.

A. RESEARCH DESIGN

We designed the research around the requirement to interact with 4th AABN to identify methods used to accomplish annual GMT requirements. To establish a baseline for the battalion, we required annual training data to identify how training is being conducted; however, the annual GMT statistics would only provide quantitative feedback. We did not simply want the training statistics, we wanted to know how training was being conducted and what requirements were placed on individual Marines to accomplish the training.

We decided that interviews with individuals assigned to 4th AABN would provide consequential qualitative data for analyzing training effectiveness. Based on the requirement to interact with individuals assigned to the battalion, this research required institutional review board (IRB) approval. Following IRB

approval, we contacted the operations officer, 4th AABN to obtain “on the shelf” annual GMT data and command chronologies to support the research. We also obtained permission from 4th AABN to obtain personnel rosters and conduct interviews with members of the battalion.

B. DATA REQUEST

Early in the research we assumed that annual GMT completion statistics would provide insight towards improving RC training; however, we were unable to obtain this data. Although we were unable to obtain annual GMT completion statistics, we were able to identify trends in business practices through the analysis of command chronologies from 2010-2015.

1. Command Chronology Cleaning

We transferred the information contained in the command chronologies from pdf to excel format to analyze the data. An excel spreadsheet was built with the following column headings to facilitate the development of a pivot table:

- Date. This included the month that the training occurred. For example, training that occurred during January 2010 was entered in the following way: 01.Jan.2010.
- Unit. Individual companies were listed under this column. The only exceptions to this were 3d Platoon, Company A and 3d Platoon, Company B because they were not co-located with their company headquarters.
- Unit location. The physical location of the unit was listed under this column.
- Training location. The two categories of training location under this column were “HTC” and “away from HTC.”
- Type of Training. Under this column, the type of training conducted was annotated according to Table 4. Based on the data provided in the command chronologies, training was placed into one of the 29 categories. Training annotated with one asterisk includes amphibious assault vehicle (AAV) preventative maintenance corrective services (PMCS). Training annotated with two asterisks includes the AAV turret trainer which is used for gunnery training.

Table 4. 4th AABN Training Categories.

1 None	10 MiscAT	19 EO/BS/Harass	28 RecordMgmt
2 NoDrill	11 MCWST	20 PFT	29 CTIP
3 BITSng	12 Hazing	21 CFT	
4 COCSng	13 SAPR	22 ATPF	
5 BSAOps	14 OPSEC	23 CyberAwareness	
6 METSng*	15 NBC	24 PII	
7 Gunnery**	16 RifleQual	25 ViolencePrevent	
8 CompanyEX	17 PistolQual	2 Tobacco	
9 2WkAT	18 ORM	27 UMAPIT	

2. Command Chronology Coding

Once the master spreadsheet was developed, a separate tab was created for each year from 2010-2015. An additional tab was created for aggregated data during the aforementioned timeframe. An example of how data was coded based off January-March 2014 training in the command chronology is depicted in Table 5.

Table 5. Command Chronology Data Input Example.

DATE	UNIT	UNITLOCATION	TNGLOCATION	TNG
01.JAN.2014	H&SCO	TAMPA,FL	HTC	METSNG
01.JAN.2014	H&SCO	TAMPA,FL	HTC	BSAOPS
01.JAN.2014	H&SCO	TAMPA,FL	HTC	PFT
02.FEB.2014	H&SCO	TAMPA,FL	AWAYFROMHTC	BSAOPS
02.FEB.2014	H&SCO	TAMPA,FL	AWAYFROMHTC	NBC
02.FEB.2014	H&SCO	TAMPA,FL	AWAYFROMHTC	METSNG
03.MAR.2014	H&SCO	TAMPA,FL	HTC	METSNG
03.MAR.2014	H&SCO	TAMPA,FL	HTC	MISCAT
03.MAR.2014	H&SCO	TAMPA,FL	HTC	RIFLEQUAL

The aggregated data tab contained command chronology training information from 2010–2015, and this facilitated the design of a pivot table for analysis. The field list for the pivot table developed off column headings listed in the previous section is annotated in Figure 4.

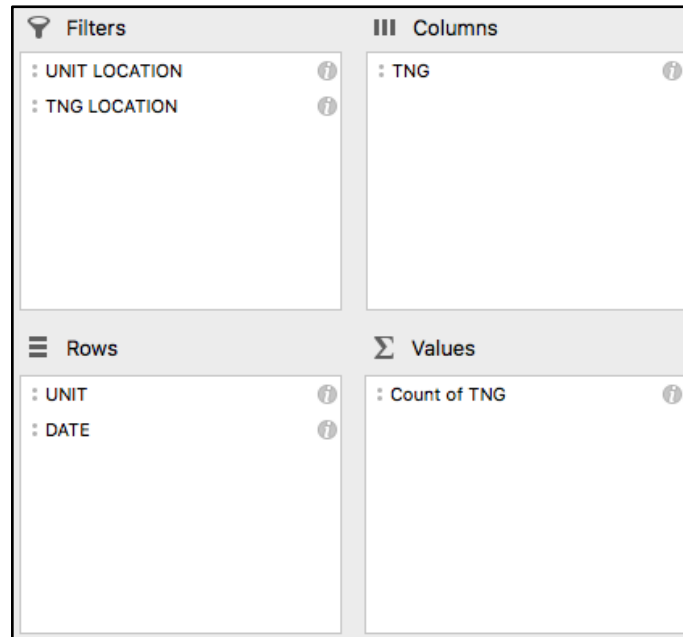


Figure 4. Pivot Table Field List, 4th AABN Training Data.

C. INFORMATION REQUEST

We requested 4th AABN personnel rosters to begin the recruitment of potential subjects for the research. The information requested from the battalion included the following variables:

- Rank
- Name
- Phone number
- Email address (to include personal email)
- Company Marines are assigned to
- Status (i.e., AD, AR, SMCR)

We requested that the personnel data be compiled into an excel database. In addition to the battalion personnel roster, we requested a schedule of drill periods categorized by company from September to December 2016. This information allowed us to coordinate travel to observe reserve training and conduct face-to-face interviews. Additionally, we identified that October would be the only time available to visit 4th AABN since drill was not conducted in September and November's drill was reserved for the MC Ball.

1. Data Cleaning

We received raw data from 4th AABN that required additional variables to facilitate the recruitment and tracking of potential research subjects. Additional variables that we added are listed below:

- Research subject code. Identified individuals by number instead of name to maintain confidentiality of potential research subjects.
- Recruitment identifier. Distinguished between individuals who were solicited for research participation during the two recruitments.
- Interview response. Differentiated between individuals who wanted to participate in the research, individuals who did not want to participate in the research, individuals who did not answer their phone, and individuals who were hesitant to provide information because of OPSEC concerns.

Variables that we initially received with the raw data required additional research for interpretation. The following reserve status codes were provided for Marines assigned to 4th AABN:

- B1: Also known as AR. This category includes reserve Marines who are assigned to active duty to provide full time support to the unit.
- K4: Includes SMCR individuals who are serving their initial 6-year obligation (2 weeks a year, 1 weekend a month). These are the junior individuals in the unit serving their first term in the SMCR.
- K7: Includes Marines assigned to the IRR.
- K9: Includes SMCR enlisted IDT individuals.

- KA: Includes all other SMCR individuals who do not fall into the K4 or K9 category. These are officers and individuals who have completed their first term in the SMCR.

Furthermore, the raw data we received included the company each Marine was assigned to; however, this information was presented as reporting unit codes (RUCs). Table 6 lists the five RUCs 4th AABN SMCR individuals are assigned to.

Table 6. 4th AABN SMCR RUCs.

SMCR RUCS		
21831	H&S Co	SMCR (Tampa, FL)
21833	B Co (-)	SMCR (Jacksonville, FL)
21834	A Co (-)	SMCR (Norfolk, VA)
21836	C Co	SMCR (Galveston, TX)
21837	D Co	SMCR (Tampa, FL)

2. Coding Scheme for Research Subjects

The “research subject code” variable we developed was important for maintaining the confidentiality of potential research subjects. Each individual in 4th AABN was given a number from 1-1055. Employment of the coding scheme will be explained in the risk mitigation section of this chapter. Additionally, we used pivot tables to track the progress of interviews and analyze data created through our research. The field list for the pivot table developed off of the variables used for our research is annotated in Figure 5.

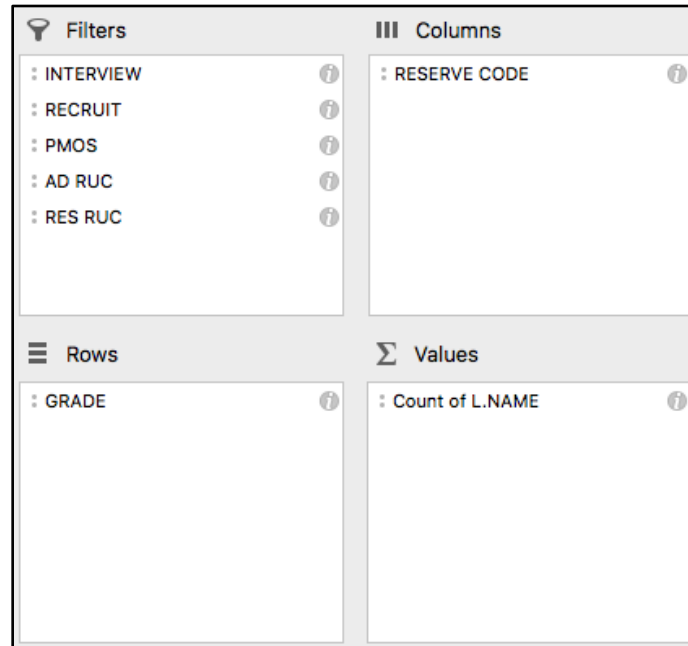


Figure 5. Pivot Table Field List, 4th AABN Personnel Data.

D. INTERVIEWS

Semi-structured interviews were conducted to identify 4th AABN business practices for accomplishing annual training requirements with a hard constraint (time). Each interview was expected to take 30 minutes; however, we found during the recruitment process that potential subjects were more likely to participate in the study if the interview lasted less than 15 minutes.

It is important to understand the hierarchy of 4th AABN because it affected the recruitment process and selection of potential interview subjects. The hierarchy for 4th AABN is as follows: battalion, company, platoon, and section. The unit consists of AC and RC personnel—instructor and inspector (I&I)—and reserve personnel. Based on this information, we decided to conduct interviews in two stages: phone interviews and face-to-face interviews.

1. Recruitment of Potential Research Subjects

The recruitment process was based on the personnel data we received from 4th AABN, depicted in Table 7. Our objective was to solicit 10% of the

battalion for interviews, or 105 individuals. During recruitment one and two, which are described later in this chapter, we solicited 13.55% (143 individuals) of the battalion for interviews.

Table 7. Composition of 4th AABN, as of August 24, 2016.

Count of L.NAME	Column Labels								
Row Labels	ACTIVE	B1	K4	K7	K9	KA	NAVY	(blank)	Grand Total
E2			44		1				45
E3			410			3			413
E4	4	5	206			25			240
E5	29	8	74		1	71	2		185
E6	19	5				39			63
E7	7			1		23			31
E8	11					13			24
E9	2					2			4
O1						2			2
O2						13			13
O3	1	1				15			17
O3E						3			3
O4	4					4			8
O5	1					2			3
O6							1		1
W2						1			1
W3						2			2
(blank)									
Grand Total	78	19	734	1	2	218	3		1055

We conducted the recruitment of potential research subjects in two steps. Step one involved the recruitment of potential subjects across the entire battalion. Step two involved the recruitment of select individuals within Headquarters and Support (H&S) Company, 4th AABN. Selection criteria for face-to-face interviews targeted battalion leadership personnel to include I&I leadership (officer and enlisted), reserve battalion leadership (officer and enlisted), I&I and reserve battalion training personnel (officer and enlisted).

Potential research subjects were solicited two times to participate in interviews. The first contact was made via email and the second contact was made via phone call. If the potential subject agreed to participate in the study, they either verbally consented to participate in the research (phone

interviews) or they signed the consent form (face-to-face interviews). During the recruitment process, military rank and position at NPS were not used to coerce participants to participate in this study. Potential subjects were informed that participation was voluntary and 4th AABN leadership did not participate in recruitment activities.

a. Recruitment One, Phone Interviews

We used the RANDBETWEEN function in excel to identify the sample of individuals from 4th AABN who would be solicited for interviews. The numbers derived from the RANDBETWEEN function were used to select potential interview subjects based on their “research subject code.” Following the random selection of potential interview subjects, we made the initial contact via email. Table 8 provides a summary of individuals who were initially contacted for interviews. The following function was used to randomly select individuals from 4th AABN for phone interviews:

=RANDBETWEEN(1,1055)

Table 8. Potential Interview Subjects, Recruitment One Summary.

Count of L.NAME	Column Labels					
Row Labels	ACTIVE	B1	K4	K7	KA	Grand Total
E2			2			2
E3			39			39
E4		1	20		2	23
E5	1	1	6		11	19
E6	1	1			5	7
E7				1	3	4
E8	1				3	4
O3					2	2
O5					1	1
W3					1	1
Grand Total	3	3	67	1	28	102

b. Recruitment Two, Face-to-Face Interviews

Recruitment two targeted all staff noncommissioned officers (SNCOs) and

officers assigned to H&S Company and Company D, 4th AABN. These individuals were targeted because they are assigned to units located in Tampa, Florida—the location that face-to-face interviews took place. Additionally, this population of individuals was targeted based on the assumption that these Marines have more experience conducting training and could provide detailed insight to 4th AABN business practices. Table 9 provides a summary of individuals from 4th AABN who were contacted for face-to-face interviews.

Table 9. Potential Interview Subjects, Recruitment Two Summary.

Count of L.NAME	Column Labels			
Row Labels	ACTIVE	B1	KA	Grand Total
E6	2	2	6	10
E7	1		7	8
E8	2		4	6
E9			1	1
O1			1	1
O2			4	4
O3		1	5	6
O3E			1	1
O4			2	2
O5	1			1
W3			1	1
Grand Total	6	3	32	41

2. Risk Mitigation

Protecting the confidentiality of all interview participants was essential based on the level of detail they were willing to provide concerning 4th AABN business practices. The excel document which contains PII is password protected and is stored on a secure NPS server. The excel document contains the “research subject code” for each individual in 4th AABN; however, research subjects are only identified by number during interviews and throughout the data compilation. Data used for the research is maintained by the principal investigator (PI). Only the PI and authorized researchers can access the data files.

3. Conduct of Interviews

All interviews were recorded so that an accurate transcription could be obtained for analysis. The interview script listed in Appendix C was used to generate conversation with the research subjects. During the interviews we asked open-ended questions to stimulate dialogue with the research subjects regarding annual GMT requirements for the RC. Based on the feedback provided, we asked follow-on questions for clarification. Additionally, we discussed how training time is allotted between core METs, core plus METs, and annual GMT requirements.

E. TECHNOLOGY RESOURCE REVIEW

During the progress of the research, we identified various technological resources that could assist with improving RC training. Some of these resources required CAC access, while others could be accessed through mobile applications. Based on this information, we were required to submit an amendment to the IRB. We reviewed the following resources to gain a better understanding of technological advancements pertaining to training.

- Command profile.¹ This is a CAC-enabled website that allows users to access training information on any unit across the MC. This website allows users to apply various filters to display information requested. Specifically, users are able to identify annual training statistics for any unit within the MC.
- MarineNet² classes. This is a website that can be accessed via username and password or by CAC. We reviewed this website to identify annual GMT classes that are available and which courses provide reserve retirement credit.
- UMAPIT³. This is also a CAC-enabled website that provides various resources to Marines. Some of these resources include family advocacy and mental health support.

¹ <https://www2.manpower.usmc.mil/cp/marines>

² <https://www.marinenet.usmc.mil>

³ <https://ehqmc.usmc.mil/sites/family/default.aspx>

- Mobile applications. The Navy is experimenting with mobile applications for annual training. We downloaded “Records Management” and “Domestic Violence” training to understand how the mobile application operates.

The following chapter will provide the results from our research based on the method described above. Results from the command chronology and interview analysis will be presented.

V. RESULTS AND EXPLORATORY ANALYSIS

Chapter V presents our findings from the command chronology analysis and interviews described in Chapter IV. The command chronology analysis assisted us with understanding how 4th AABN conducts annual training; however, the interviews provided insight to the effectiveness of unit's training model. Within the following sections, we highlight some of the comments that represent important trends expressed by the interviewees. In Chapter VI, we integrate the data to identify three developments—command directed training, unit Marine awareness and prevention integrated training (UMAPIT) mobile application, and dynamic training approach—that are most important to the RC.

A. 4TH AABN TRAINING MODEL

The following section presents annual training data that we identified through analysis of 4th AABN command chronologies. We were able to identify the following trends for the unit's training model:

- January and February are spent conducting beach support area (BSA) operations and combat operations center (COC) training.
- March and April are reserved for gunnery training and rifle range.
- Physical fitness tests (PFT) are typically conducted in May.
- A large portion of annual training classes are conducted in May.
- June and July are spent conducting the two-week AT.
- August, September, and October are the months where minimal training occurs. Our research identified that drill did not occur in one of the companies within the battalion seven times in August, three times in September, and five times in October between 2010–2015.
- November is reserved for the MC Ball and family day.
- Toys-For-Tots is the priority for December.
- Combat fitness tests (CFT) and annual training classes are typically conducted in November and December.

1. Annual Training Statistics

Appendix D captures the annual events 4th AABN conducted during drill periods between 2010-2015 that were listed in the command chronologies. Throughout this period, 4th AABN conducted 564 training events arranged as follows:

- 285 MET events to include two-week AT, BSA training, company field exercises (FEX), COC training, and AAV gunnery. Additional MET training that is included in this category includes AAV PMCS.⁴
- 279 annual GMT events.

Additionally, there were times that drill did not take place or training events did not occur.

- 26 drills that did not include any training events.
- 24 months that drill did not occur.

Our research revealed that the data presented in the command chronologies was not standardized across the battalion. For example, some units would list each individual GMT class that they completed during the year (i.e., SAPR, records management, tobacco cessation, etc.). Other units would annotate the completion of GMT requirements as “annual training classes.”

Based on the lack of details presented in the command chronologies, we made assumptions on the type of training conducted and grouped it into one of the categories previously listed in Table 4. Of note, SAPR, OPSEC, and PII were three annual GMT requirements that did not appear in the 2010-2015 command chronologies.

⁴ Two-week AT is training conducted in an active duty status. This training is normally conducted away from the reserve center. BSA and COC training focuses on logistical and operational support provided to the AAV company or battalion. For the purpose of this research, AAV gunnery includes non-fire (gunnery simulation) and live fire training. AAV PMCS includes the maintenance and services required to sustain the AAV unit's operational readiness.

2. Annual Training Locations

We identified that a majority of the MET events and specific GMT events like the rifle range, NBC chamber, and pistol range occur at training locations away from HTC. 4th AABN's two-week AT typically occurs at Camp Lejeune, North Carolina or Camp Pendleton, California. Our research revealed that 4th AABN conducted 102 training events away from HTC. Table 10 exhibits the training events that were conducted away from HTC during 2010-2015. It is important to highlight that Table 10, as well as Appendix D, lists Company A and Company B multiple times (i.e., Co A (-), Co A, Co B (-), Co B). This is the result of unit deactivations during the time period mentioned.

Table 10. Annual Training Conducted Away from HTC, 2010-2015.

Count	ENG	Column	Labels																		
Row	Labels	2WK	AT	BSA	DPS	CO	EX	GUNNERY	MCWST	MET	ENG	MISC	AT	NBC	PISTOL	RIFLE	QUAL	RIFLE	QUAL	Grand	Total
COA(-)		4				4		1	1					1				1		12	
COA,BDIPLAT		1						1			1							1		4	
COB		2				1		1			2			1			2	2		11	
COB(-)		3						1			1							1		6	
COB,BDIPLAT(+)		3						2	2		2			1				2		12	
COE		2						4			4			3				3		16	
COE		2						2			4						2	2		12	
H&SICO		5		1				1			2		1	1				4		15	
COA		1				1		2			8							2		14	
GrandTotal		23		1		6		15	3		24	1	7			4	18		102		

Furthermore, our research revealed that substantial time is spent traveling to and from training sites. Table 11 shows the time it takes to travel from HTCs to the respective training locations via bus. We also learned that 6-8 drill periods are used to accomplish the training that is conducted away from HTC.

Table 11. 4th AABN Travel Time from HTC's to Training Areas.

From	To	Travel Time By Bus
Galveston, TX	Camp Bullis	5-6 hours
	Fort Hood	4-5 hours
Tampa, FL	Camp Blanding	3 hours
	Avon Park	2-3 hours
	Fort Stewart	5-6 hours
	Camp Lejeune	12-14 hours
Norfolk, VA	AP Hill	2 hours
	Fort Eustace	1 hour
	Blackstone	2 hours
	Camp Lejeune	5 hours
	Fort Pickett	2 hours

3. Effect of Civic Action on 4th AABN

Early in our research we assumed that civic action events such as funeral details, casualty assistance calls, parades and color guards, and Toys-For-Tots played a critical role in the training time allotted towards 4th AABN. What we learned through our research was that a majority of these events are covered by the I&I staff. We were unable to differentiate between the number of civic action events that are covered by the I&I staff and those covered by the SMCR due to inconsistencies in command chronology reporting. Some units separated civic action events completed by I&I staff and the SMCR, while others grouped all civic action events together. Listed below are the 4,870 civic action events that 4th AABN conducted from 2010-2015:

- Casualty assistance calls: 68
- Funeral details: 3,121
- Parade and color guards: 283
- Speaking engagements: 92
- Static displays: 165

- Toys-For-Tots events: 1,141

B. EXPLORATORY ANALYSIS

The previous section describes 4th AABN's training model. This section will present our findings from interviews conducted with AC and RC Marines assigned to 4th AABN. We will begin by describing how we obtained research subjects and will conclude by categorizing interview responses regarding 4th AABN's current training model.

1. Results of the Recruitment of Potential Research Subjects

As previously mentioned in Chapter IV, we recruited 102 individuals across 4th AABN for phone interviews and 41 SNCOs and officers for face-to-face interviews. The response rate to the initial recruitment email was:

- Recruitment one, phone interview: 3.9% response rate.
- Recruitment two, face-to-face interview: 4.9% response rate.

Due to the poor response rate to the initial recruitment email, we solicited a second time via phone to locate additional research subjects. Based on the second recruitment, we were able to obtain 16.7% of the individuals solicited for phone interviews (illustrated in Table 12) and 41.4% of the individuals solicited for face-to-face interviews (illustrated in Table 13) to participate in our research. An important difference to highlight between the two groups of interview subjects is that recruitment one included 76.4% E-5 and below, whereas recruitment two included E-6 and above. Although discussions regarding annual training were similar, there were significant differences in perceptions concerning training effectiveness. Those differences will be discussed later in this chapter.

Table 12. 4th AABN Interview Subjects, Recruitment 1.

Count of L.NAME	Column Labels				
Row Labels	B1	K4	K7	KA	Grand Total
E2		2			2
E3		6			6
E4	1	2			3
E5				2	2
E7			1	2	3
W3				1	1
Grand Total	1	10	1	5	17

Table 13. 4th AABN Interview Subjects, Recruitment 2.

Count of L.NAME	Column Labels			
Row Labels	ACTIVE	B1	KA	Grand Total
E6		1	3	4
E7			3	3
E8	1			1
O3		1	1	2
O4			2	2
O5	1			1
W3			1	1
Grand Total	2	2	10	14

Table 14 depicts the descriptive statistics for the time each research subject has been assigned to 4th AABN. Time that a subject was assigned to 4th AABN ranged from three months to over 20 years.

Table 14. Descriptive Statistics for Research Subjects'
Time Assigned to 4th AABN.

<i>TIME AT UNIT (YRS)</i>	
Mean	3.34
Standard Error	0.83
Median	1
Mode	0.75
Standard Deviation	4.62
Sample Variance	21.38
Kurtosis	6.05
Skewness	2.40
Range	19.75
Minimum	0.25
Maximum	20
Sum	103.54
Count	31

During the recruitment, we discovered the following:

- 100 individuals did not answer their phone.
- Two individuals were concerned about OPSEC and did not participate in the research.
- One individual was no longer with the unit.
- Nine individuals ranging from sergeant to master sergeant did not want to participate in the research.

2. Individual Perceptions from Interviews

When interview subjects were asked if they thought the annual training model was effective for 4th AABN, 53.8% of the recruitment one participants said yes, whereas only 33.3% of recruitment two participants had the same response—these differences will be explained in Chapter VI. In the following sections, we will present information by interview response category.

a. *Fundamental Challenges for the RC*

Time is one of the largest concerns that Marines expressed when it comes to annual training requirements. 4th AABN has the same annual training requirements as its AC counterpart; however, the RC has substantially less time to accomplish their tasks.

For me there is no reason to come up with better ways [for training]. Trying to fit this whole table top's worth of tasks into the size of this piece of paper and the size of this piece of paper is time—this is the time it takes and this is the time you've got. I don't care how many times you move the pieces around on the board, it doesn't fit in here.

Everything is compounded on the reserve side. On the active side, you give me another task—I will do that task and I will not do one of those other tasks you told me to do—if you don't tell me which one not to do, I will pick it because there is no more time. On the reserve side, you give me a task and don't tell me the 10 other task you don't want me to do because I have 1/10th of the time, then I'm going to pick them and I'll be less ready.

In addition to time, subjects expressed concerns with the organizational structure of the MC shifting from a strategic reserve to an operational reserve. Marines expressed concerns that although the role of the reserves has changed, the structure has not been updated to support operational requirements.

There is a fundamental—to me—problem with the MC not accepting that the structure that we have as a RC was set up as a strategic reserve which means that it will be about 20-40% ready of the operational forces. The system that we set up of one weekend a month and two months in the summer was done to have a 40, 50, 60% force that would go through the steps of the mobilization, activation, integration, and deactivation plan (MAID-P) and come out the other end a ready force like the active component that can be employed by the component commanders.

We've fundamentally shifted from a complete strategic reserve to a strategic reserve and also operational reserve, but we didn't change the construct of what we are able to do with regard to how Marines are contracted in the reserve component and what we can pay for.

b. Effectiveness of 4th AABN Current Training Model

We identified that the common perception by individuals interviewed is that the current training model is effective with regard to baseline training. Research subjects believe that 4th AABN is effective with accomplishing battalion METLs—land, water, and gunnery training. Although the research subjects think MET accomplishment is effective, this only accounts for 50.5% (285 of 564 training events) of the overall training activities.

With the amount of time we have to train within a given FY we do a good job of maximizing the schedule so that we have a good, healthy balance of field training and making sure we satisfy the other training requirements as well.

The companies get very creative with maximizing their training exercise employment plan (TEEP)—like staggering their platoons through the month so that all Marines have an opportunity to train on the equipment.

Rifle range, pistol range are excellent—what gets the check in the box is the MarineNet stuff.

Our research also revealed that 4th AABN has challenges with completing annual GMT requirements. Every individual that was interviewed stated that they are required to complete MarineNet training during non-drill time; however, these efforts are not compensated. Subjects explained that they are required to complete MarineNet courses prior to drill. If a Marine does not have the ability to complete the MarineNet course prior to drill, they use the business center at the hotel or WiFi and a computer from another Marine to accomplish the training.

Additionally, Marines expressed concerns that classes they complete on MarineNet are often taught multiple times via PowerPoint at the reserve center. Subjects also expressed concerns that MarineNet classes are redundant from year to year and multiple topics covered only pertain to the AC.

I don't think it's [training] very effective because a lot of the time we are told to do MarineNet courses and when we are here we are ushered into the gym to get the same classes.

Whether Marines come in during drill and sit in a gym and get it force fed to them or they go do it on their own time and simply click, click, click they are not looking at the content on MarineNet. So I don't know how much value added is the MarineNet.

Typically, they do a MarineNet class and then a teacher class. We get the same thing twice.

It feels like we do a lot of things over and over and it's not being productive. And better communication. You always tell Marines to adapt and overcome but we are losing Marines.

Although we did not receive annual training data between 2010-2015 for 4th AABN, we were able to obtain training statistics on November 8, 2016 from the USMC Command Suite website. Figure 6 provides a snapshot of the annual training completion statistics for SMCR individuals assigned to 4th AABN.

CY Annual Required Training Events (2016)			
DESCRIPTION	Taken	Not Taken	% COMPLETE
ALCOHOL AND SUBSTANCE ABUSE PREVENTION AND CONTROL TRNG (SF)	0	941	0
ANNUAL HAZING PREVENTION TRAINING	716	225	76.09
ANNUAL MILITARY EO TRAINING (MEO)	590	351	62.7
ANNUAL OPSEC TRAINING	576	365	61.21
ANNUAL SEXUAL HARASSMENT TRAINING	412	529	43.78
ANTI-TERRORIST ANNUAL TRAINING DATE	424	517	45.06
HYPERTENSION EDUCATION AND CONTROL TRAINING (SF)	10	931	1.06
INJURY PREVENTION TRAINING (SF)	10	931	1.06
NUTRITION TRAINING (SF)	0	941	0
PHYSICAL FITNESS TRAINING (SF)	10	931	1.06
RISK MANAGEMENT	445	496	47.29
SEXUAL HEALTH (STI/HIV) TRAINING (SF)	99	842	10.52
TOBACCO PREVENTION AND CESSATION (SF)	431	510	45.8
UMAPIT	707	234	75.13

Sexual Assault Prevention and Response (FY 2017)				
DESCRIPTION	REQUIRED	COMPLETED	Not Complete	% Complete
SEXUAL ASSAULT PREVENTION AND RESPONSE ANNUAL TRAINING	298	0	298	0
STEP UP (SAPR FOR JUNIOR MARINES)	461	0	461	0
TAKE A STAND (SEXUAL ASSAULT NCO CRS)	367	185	182	50.41

FY Annual Required Training Events (2017)			
DESCRIPTION	Taken	Not Taken	% COMPLETE
COMBATING TRAFFICKING IN PERSONS	1	940	.11
INFORMATION ASSURANCE AWARENESS TRAINING	6	935	.64
PERSONAL IDENTIFIABLE INFORMATION	6	935	.64

Current filters: SMCR

Current Unit: 4TH AAV BN 4TH MARDIV

Figure 6. 4th AABN SMCR Annual Required Training Completion, as of November 8, 2016. Source: Command Suite (2016).

c. Challenges to Completing Annual GMT Requirements

As previously mentioned, the time constraint is a concern for 4th AABN. There is not enough time on the schedule to accomplish all MET requirements and annual GMT requirements. As such, RC Marines are expected to accomplish annual training on their own time. If annual GMT requirements are not completed during non-drill time, training is shifted around to ensure it is accomplished. As a result of Marines failing to complete training during non-drill time, MET training and unit readiness are affected. The following example demonstrates how Marines within 4th AABN view the accomplishment of annual GMT:

The best thing is do it [annual GMT classes] on your own time then you don't have to come to drill and do it. Secondary, we'll pull rosters and see that we're 50% complete for sexual assault—get everybody in the gym. Preferred method is to do it on your own time or do it with hotspots during down time. Last, is get everybody in the gym because clearly they aren't doing on their own time or in their free time.

Our research revealed that it is difficult for RC Marines to accomplish annual GMT requirements during non-drill time. One subject mentioned that a majority of the Marines in his unit are either full-time students or they have a full-time civilian job—there are not many Marines who have a lot of extra time to complete annual GMT requirements during non-drill time. Marines that do not have rotating schedules are forced to do annual GMT training during the last minute right before drill or during drill when other training is not taking place.

Furthermore, Marines expressed concerns with access to MarineNet and compatibility issues with different operating systems. Subjects mentioned that MC technology has not caught up with 2016 technology. They mentioned that Marines have issues completing annual GMT courses on MarineNet because it will not launch only to find out that MarineNet is not compatible with Microsoft Edge.

One research subject provided an example that puts the annual GMT requirement into perspective. They stated that the MC is asking a lot for a kid that works construction 12 hours a day to come home, shower, eat, and then go to the library so that they can accomplish MarineNet training. Additionally, another subject stated that junior Marines cannot be held accountable for failing to complete annual training on MarineNet when they do not have the resources (i.e., WiFi, sufficient data to complete training, computer, internet, etc.) to accomplish the requirements. The subject did not feel that it was fair to ask a Marine who gets paid \$200 for three days of work at drill to go out and buy a \$1,000 computer.

Research subjects also expressed concerns with technology capabilities at the drill center. Subjects stated that reserve locations do not have learning resource centers like AC units to conduct computer-based training. Subjects also expressed concerns with the lack of WiFi access at drill centers to complete web-based training on their personal devices. This has led to Marines using their own WiFi hotspots and computers to assist others with meeting training requirements.

One research subject stated that annual training is conducted close to 50% of the time. They also stated that due to scheduling conflicts, the annual GMT classes typically take longer than planned.

The class is scheduled for 0900, so everyone comes in at 0900—oh wait, a group is doing something so they wait for 20-30 minutes, the computer doesn't work. An hour long course turns into a two-hour ordeal.

d. *PME Impact*

We identified that PME requirements are having a substantial impact on 4th AABN. For example, the Lance Corporal Seminar is a command sponsored event which takes time and resources from the company and battalion. An event that would take an AC unit one week to accomplish takes the RC three months.

It [Lance Corporal Seminar] has a huge effect on me because this drill coming up next weekend we intended to spread it out between 3 drills—October, December, and January. We only run it on Sundays and the requirement is only 2 days, but because I don't have enough Marines with Leading Marines done—I have to use next Sunday to get everyone on a computer to get the course done so that December and January I can put them through the seminar so that they get promoted.

They aren't getting it [MarineNet classes] done on their own time outside of drills—lance corporals—I am going to make them do it. It's different than SNCOs, they shouldn't need their hands held. These young Marines, they don't know yet. They don't know it's a serious thing. I want them to get it done.

Now we're taking lance corporals away from training. It's not like they spend two days at the seminar and then they are back on the ramp. They have to wait a whole month or two to get back to the training. Taking any of the Marines away from MET based training that we are doing on the weekend has a huge impact on readiness because now they are out of luck.

Based on the amount of time it takes to accomplish command sponsored PME, one subject made the following recommendations to improve the effectiveness of the training:

Specifically, get money to pay guys to come in. I feel the seminars are great on the active duty. Command sponsored—got it. If it is going to be command-sponsored on the reserve side, then there needs to be money available to bring the Marines in on orders to their unit to do the class...What it boils down to is give the money to the units to bring the Marines in on orders to do this training.

e. Drill Preparation and Communication

Our research found that Marines spend countless hours preparing for drill and are not compensated. We found that junior Marines spend less time preparing for drill than SNCOs and officers. We also found that Marines spend between 30 minutes to two hours per MarineNet course during non-drill time. Some subjects stated that they will spend a whole weekend conducting annual GMT requirements.

SNCOs and officers that were interviewed felt that they needed to conduct preparations outside of drill time in order to facilitate the success of the unit. Despite these efforts, RC Marines are not compensated for work that is conducted outside of their drill periods.

Speaking for a given month, I'll easily put in 16-24 hours preparing at least, of my own time...For me, getting to drill is the most relaxing part of my SMCR experience during a given month because all my work has been done during the previous 30 days and I watch the execution.

Depends on what we are doing, 10-20 hours a month.

Anywhere from 8-12 hours a week.

Research subjects also stated that communication is challenging for reserve units. Multiple individuals interviewed stated that there are challenges with communicating throughout the unit. During non-drill periods, communication is done through personal email; however, during drill periods, communication is done through usmc.mil accounts. Reserve Marines do not have access to government email accounts or unit SharePoint sites during non-drill periods. As a result, Marines resort to using commercial file sharing resources like Dropbox and Google Documents. Finally, Marines expressed concerns with secure messaging in the RC. Subjects explained that there are times where they have to wait to accomplish tasks until they get to drill due to OPSEC concerns and lack of secure messaging.

Communication is basically the only issue we normally run in to—people won't answer their phones or won't get back to you in time for a deadline. Everybody lives so far away and they are all spread out, it's not like you see everyone each day. Some don't check emails. I have a Marine who is unauthorized absence (UA) today—his phone is dead half the time or it is out of service and the only time he gets text messages is when he has WiFi.

My first drill here there was a medical stand down in the gym and there was supposed to be a retirement and they didn't deconflict the gym. It was raining outside so they put the retirement under the overhang and the gym was for the retirement. No one talked to

deconflict the gym.

One subject recommended the following as a way to improve communication within the RC.

Have Navy-Marine Corps internet (NMCI) figure a way to access their systems easier. Another big thing is using white dollars for WiFi in the drill center. Marines use a lot of their own money to accomplish the mission. We use a lot of our own resources and own money. If the MC allowed us to put in commercial WiFi, it would alleviate some of the issues.

f. Incentivizing Reservists

Our research revealed that reserve retirement credit (RRC) is only offered for certain correspondence courses and that RC Marines cannot receive credit for conducting annual GMT courses outside of drill (A. Davis, personal communication, October 13, 2016). Chapter II described the current MCR policy which prevents Marines from receiving retirement credit for annual GMT courses. The research subjects were asked how reservists could be incentivized to accomplish training during non-drill time. Some responses were tied to money while others felt that conducting annual training during drill periods was the only option.

You have SNCOs and officers who are involved because they love doing it and don't get paid for it. You have others that do it because it is a job. There is no incentive to go above and beyond.

If you want your section and unit to be important—you have to take it outside and basically do it for free. If not, coming to formation and doing everything at a drill—you realize the day is over with.

There are young Marines—very few who are unemployed—some are in college; some are full time employed. What would help them complete it? I wouldn't say monetary, maybe if one drill was spent going to the learning and research center at MacDill Airforce Base.

C. OPPORTUNITIES FOR IMPROVEMENT

This chapter presented the findings from our analysis of 4th AABN command chronologies from 2010-2015 and interviews with 31 Marines assigned

to the unit. In the following chapter, we will use the results of our research to provide recommendations for the improvement of RC annual training.

VI. SUMMARY / CONCLUSIONS / RECOMMENDATIONS

Chapter V presented our findings from analyzing 4th AABN command chronologies and exploratory interviews. This chapter synthesizes the results from our findings into a model for providing RC commanders with additional options for improving annual training. This chapter also provides conclusions and recommendations for improving RC annual training. Finally, we will conclude with limitations and areas for future research.

A. CONCEPTUAL FRAMEWORK

Based on our analysis of 4th AABN command chronologies and interviews with personnel assigned to the unit, we believe annual GMT should be separated into the following categories: field training, fitness tests, on-line mandated training, command directed training, and dynamic training approach. These categories are illustrated in Figure 7 and are explained below.

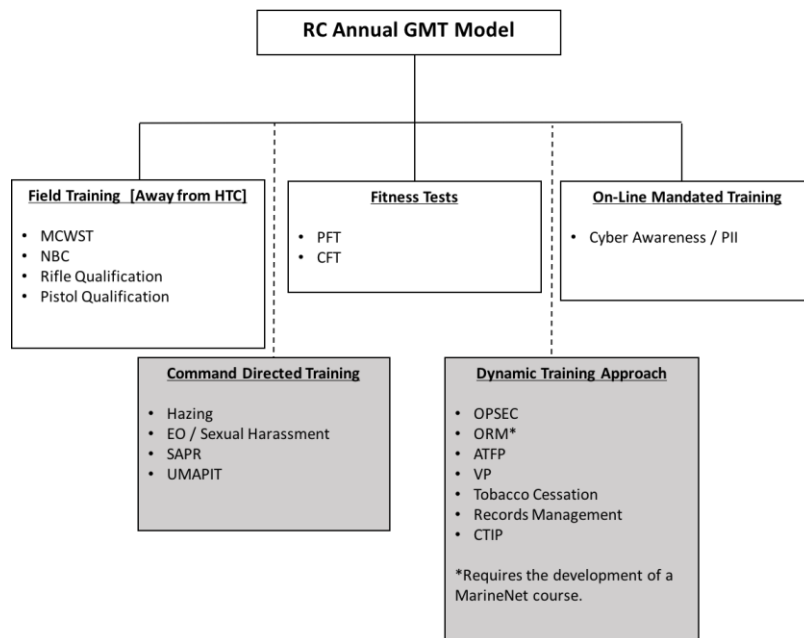


Figure 7. RC Annual GMT Model.

We believe that field training, fitness tests, and on-line mandated training are being conducted efficiently and there is minimal room for improving these events. Our research identified that field training and fitness tests are effectively planned for in the annual TEEP. Additionally, cyber awareness / PII is the only annual GMT that must be conducted online per DOD mandate. Our recommendations focus on the command directed training and dynamic training approach categories—11 of the 18 annual GMT fall within those categories. Improving these two areas will provide RC commanders with more time to conduct MET training; however, policy changes and technological advancements will be required to incentivize Marines to conduct annual training during non-drill time.

1. Command Directed Training

We believe that command directed training—hazing, EO / sexual harassment, SAPR, UMAPIT—should be presented in a small unit setting. Designated personnel with proper credentials must give the EO and SAPR training; however, this is an ideal opportunity for small unit leaders (SUL) to cover hazing and family advocacy training.

August, September, and October are the recommended months for this training. This would allow SULs to sit down with their Marines prior to the holiday periods to discuss the important topics in this category.

2. UMAPIT Mobile Application

UMAPIT was developed to combine combating operational stress control, substance abuse, family advocacy, and suicide prevention and response into an interactive program. It was also designed to be delivered to small groups. Security features for the website—namely CAC access—prevent reservists from logging on to the website when they are not at the drill center. The UMAPIT website provides numerous resources for Marines and their families; unfortunately, we feel that this resource could be improved substantially.

We feel that developing a UMAPIT mobile application would benefit the AC and RC. Marines, especially SULs, would be able to access numerous resources by logging on the mobile application. The mobile application would not replace the annual class requirement; however, it would improve accessibility to critical resources for Marines.

3. Dynamic Training Approach

Our research identified issues with RC Marines completing MarineNet training during non-drill periods. The expectation by 4th AABN leadership is that Marines conduct on-line training prior to drill; however, there is minimal incentive to conduct this training at home. Our research revealed that PowerPoint classes are taught to the same people who took the online course. Our research also identified that Marines conduct the same training multiple times in a year. We believe that the opportunity cost for conducting on-line training at home prevents Marines from doing annual GMT during non-drill periods.

We believe that a dynamic training approach is the ideal method for conducting the following courses: OPSEC, ORM, ATRP, VP, tobacco cessation, records management, and CTIP. We do not feel that these classes should be taught at the drill center. Rather, these classes need to either be done at home or during transit to or from training that is conducted away from HTC. Chapter V described training that is conducted away from HTC. From 2010-2015, 4th AABN conducted 102 training events away from HTC. Aside from the two-week AT, the training requires a 1 to 14-hour bus ride from the HTC. This is a perfect opportunity to conduct the annual GMT courses described above for individuals who have not completed the MarineNet training.

B. CONCLUSIONS, LIMITATIONS, AND RECOMMENDATIONS FOR FUTURE RESEARCH

In conclusion, our research demonstrates that numerous factors are involved with training the RC. A major factor in the training effectiveness of the RC is the total force concept where RC units are expected to accomplish the

same tasks as AC units, but with 1/10th of the time. As such, RC units prioritize training and accomplish what they can with the time allotted. Other factors such as command-sponsored PME events, MarineNet connectivity issues, communication, and completing the same training multiple times a year contributes to a unit's training readiness.

Command chronology analysis and interviews with personnel assigned to 4th AABN provided an exploratory insight to the unit's annual training model. Using command chronology data and interview transcripts, we developed a training model that can be used by 4th AABN to improve training effectiveness and efficiency. We believe that the delivery and completion method for 11 of the 18 annual general military training tasks can be improved. By improving how these 11 tasks are completed, RC commanders will have more time to focus on MET training. We also discovered that completing annual GMT tasks via MarineNet is more complicated for the RC than the AC. As such, failure for individuals to complete annual GMT during non-drill periods has an indirect trickle-down effect for MET accomplishment.

1. Research Limitations

The findings of this research could be used to identify the effects of increased annual training requirements on 4th AABN; however, more research needs to be done to see if these results are applicable across the RC. Our study was limited to Marines assigned to 4th AABN and small samples from the battalion were selected. The first sample was selected from all Marines in the battalion, whereas the second sample was selected from SNCOs and officers within H&S Company and Company D, 4th AABN.

Additionally, recruitment for potential research subjects was conducted from our personal email addresses and phones. Due to IRB stipulations, we were unable to use rank during the recruitment process which affected potential subject participation in the research. There were also Marines concerned about OPSEC during the recruitment and did not wish to participate in the research.

2. Recommendations for Future Research

Throughout our research, we identified areas that require further analysis to improve the effectiveness and efficiency of RC training. The following recommendations for future research will provide additional options for RC commanders to accomplish annual training requirements.

We believe that a review of the current RRC policy to determine if reserve Marines can receive credit for completing annual GMT requirements would help incentivize training during non-drill time. We recommend that the following courses receive a total of two RRC points: cyber awareness / PII, OPSEC, ORM, ATPF, VP, tobacco cessation, records management, and CTIP. For example, assume that a reserve Marine could get two RRC points for completing dynamic training described earlier in this chapter. This would allow a commander the option to have their unit complete annual GMT requirements via MarineNet. The Marine would receive credit for the training and the commander would have more time to focus on MET training requirements.

We also believe that a cost-benefit analysis of WiFi access for reserve centers is necessary. Technology advancements at reserve centers could potentially assist reserve Marines with conducting online training during drill periods. Additionally, we believe that a cost-benefit analysis for allocating additional money towards ADT to allow units to conduct command-sponsored leadership courses during non-drill time needs to be considered. It takes approximately two months for a lance corporal to complete the command-sponsored course because it is only conducted during drill periods. Allowing SMCR Marines to conduct command-sponsored leadership training during ADT with the I&I as the instructor cadre would reduce the training time from two months to two days.

Finally, we believe that MARFORRES should develop a survey with manpower and reserve affairs (M&RA) to understand the effects on the RC from increased annual training requirements. Additional variables required for the survey are: time in service, time in grade, time at the unit, service component, civilian job, and level of education. The recommended target population for this survey is 1) Marines who have spent time in the AC and RC, or 2) Marines who have spent a minimum four years in the RC.

APPENDIX A. MARINE CORPS ANNUAL GMT REQUIREMENTS

The following table was adapted from MCBUL 1500, *Annual Training and Education Requirements*.

Annual Training Requirement	Mandate Authority	Delivery Method	Training per Fiscal Year (FY) / Calendar Year (CY)
Marine Corps Water Survival Training (MCWST)	MC	Unit Training	To be determined by the first general officer in the chain of command
Hazing	DON	Unit Training	CY – Refresher Training
Sexual Assault Prevention and Response (SAPR)	DOD	Unit Training	FY
The Marine Corps Operations Security (OPSEC) Program	DOD	Unit Training or MarineNet OPSECUS001	CY – Refresher Training
Chemical, Biological, Radiological, and Nuclear Defense Training Requirements	MC	Unit Training	AC: Every 2 FY and at least 6 months prior to deployment. RC: At least 6 months prior to deployment.
Marine Corps Combat Marksmanship Rifle	MC	Unit Training	FY
Marine Corps Combat Marksmanship Pistol	MC	Unit Training	AC: FY RC: At least 6 months prior to deployment. Marines selected to SSgt will conduct initial qualification within 2 years of promotion.
Operational Risk Management (ORM)	DOD	Unit Training	AC: Every 2 CY. RC: Every 3 CY.
Marine Corps Equal Opportunity (EO) and Sexual Harassment	DOD and DON	Unit Training	CY
Marine Corps Physical Fitness Program – PFT	MC	Unit Training	CY
Marine Corps Physical Fitness Program – CFT	MC	Unit Training	CY
Level I Anti-Terrorism Training / Counter Intelligence Awareness and Reporting	DOD	Unit Training or MarineNet JATLV100000	CY
Annual Cyber Awareness / Personally Identifiable Information Training	DOD	MarineNet CYBERM0000	CY
Violence Prevention Awareness Training	DOD	Unit Training or MarineNet ILEVPPA01A	CY
Tobacco Cessation (Semper Fit)	DOD	Unit Training or MarineNet SFTOBCESS0	CY
Unit Marine Awareness and Prevention Integrated Training (UMAPIT)	DOD	Unit Training	CY
Records Management Training	DOD and DON	Unit Training or MarineNet M01RMT0700	CY
Combating Trafficking in Persons (CTIP)	DOD and DON	Unit Training or MarineNet DD01AO0000	FY refresher course authorized if full course completed in previous 3 years.

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APPENDIX B. MARINE CORPS RESERVE PME PROMOTION REQUIREMENTS

The following information was taken from MARADMIN 521/14, "Updated Enlisted PME Promotion Requirements by Grade and Announcement of Command Sponsored Lance Corporal Leadership-Ethics and Career Course Seminar."

Lance Corporal to Corporal

Current: Complete MarineNet EPME 3000AA Course or MCI 0037.

Effective 1 Oct 15: Complete MarineNet EPME 3000AA Course and then complete a command-sponsored Lance Corporal Leadership and Ethics seminar.

Corporal to Sergeant

Current: Complete MarineNet EPME 4000AAA Course. Completing a Command-Sponsored Corporal's Course is highly recommended.

Future: Complete MarineNet EPME 4000AA Course and then complete a reserve command-sponsored Corporal's course.

Sergeant to Staff Sergeant

Current: Complete MarineNet EPME 5000AA Course or MCI 8010.

Effective 1 Oct 17: Complete MarineNet EPME 5000AA Course and then complete the resident two-week reserve Sergeant's Course.

Staff Sergeant to Gunnery Sergeant

Current: Complete the MarineNet EPME 6000AA Course or MCI 8100.

Effective 1 Oct 16: Complete the MarineNet EPME 6000AA course and then complete either the resident two-week reserve career course or the career course seminar distance education program.

Gunnery Sergeant to Master Sergeant / First Sergeant

Complete the MarineNet EPME 7000AA Course or the MCI 8200 and then complete the resident two-week reserve advanced course.

Master Sergeant to Master Gunnery Sergeant

Complete a regional Master Sergeant / First Sergeant Seminar

First Sergeant to Sergeant Major

Complete a regional Master Sergeant / First Sergeant Seminar and complete the First Sergeant Course.

Sergeant Major

Complete the Sergeant Major Course

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APPENDIX C. INTERVIEW SCRIPT

Note: This is the general script for the open-ended interview. It is expected that these questions will spark further conversation on the topic of the effect of increased training requirements on 4th AABN.

- What is your name?
- What unit are you assigned to?
- What is your billet?
- How long have you been assigned to the unit?
- How effective is the current training model for your unit?
- What does the reserve training schedule look like?
- How is annual training funded?
- What does a reserve drill consist of?
- What kind of events are conducted during a reserve drill?
- On average, how many hours do Marines spend at the drill center during training weekends?
- How is annual training conducted (i.e., PowerPoint, MarineNet, etc.)?
- What challenges are there for completing annual training requirements?
- What approaches has 4th AABN used to accomplish annual training requirements?
- What resources are required to conduct annual training?
- How easy is it to obtain resources (i.e., training areas, class rooms, etc.)?
- How has sequestration affected the accomplishment of annual training requirements?
- What factors prevent individuals from participating in training?

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APPENDIX D. COMMAND CHRONOLOGY TRAINING DATA, 2010-2015

The three tables below display 4th AABN's training data from the 2010-2015 command chronologies. The middle and bottom tables show the number of annual GMT events that occurred the time frame mentioned.

Count of Training										
Row Labels	NONE	NO DRILL	BITS TRAINING	COC TRAINING	BSA OPS	MET TRAINING	GUNNERY	COFEX	2WK CAT	PME
COA (-)	1	5		5		14	11	4		4
COA, BDP LAT	4	2				17	1			1
COB	4	3		1		14	4	1		2
COB (-)	1	1				25	6			3
COB, BDP LAT (+)	1			1		17	5			3
COIC	1	2	1			19	8			2
COID	10	2				14	4			2
H&SICO	4	8		7	14	40	10			5
COA		1				13	6	1		1
Grand Total	26	24	1	14	14	173	55	6	23	1

Count of Training							
Row Labels	MISC CAT	MCWST	HAZING	NBC	RIFLE QUAL	PISTOL QUAL	ORM
COA (-)	8	3		3	4	5	
COA, BDP LAT	4	2		3	4	3	
COB	6	3		2	5	3	
COB (-)	9	4		3	3	1	
COB, BDP LAT (+)	7	3		3	4	1	
COIC	3	2	2	3	4	2	1
COID	6	1		1	4	2	
H&SICO	17	5		5	7	4	1
COA	3	1		2	3		
Grand Total	63	24	2	25	38	21	2

Count of Training										
Row Labels	EO/SEX/HARASS	PFT	CFT	ATFP	CYBER/AWARE	VIOL PREVENT	TOBACCO	UMAPIT	RECORD MGMT	CTIP
COA (-)		6	8							
COA, BDP LAT	1	2	3							
COB		1	4							
COB (-)		4	12							
COB, BDP LAT (+)		5	5							
COIC	2	5	3	1	1	1	1	2	1	1
COID		4	2							
H&SICO	1	13	9	1						1
COA		2	1					1		
Grand Total	4	42	47	2	1	1	1	3	1	2

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